Sterling Reverse Logistics: User Guide

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Contents

5   Determining Whether an Area is Serviced

6   Taking an Appointment on a Service Work Order

7   Managing Team Members on Service Work Order Appointments

Part II   Return Order Screen Reference

8   Return Console Screens

9   Create Return Order Screens

10   Create Return Shipment Screens

11   Return Shipment Console Screens

12   Service Work Order Console Screens

13   Serviced Area Search Screens

14   Route Entry Screens

Index

Preface

Intended Audience

This manual is intended to provide assistance to customer service representatives who are using the Sterling Reverse Logistics Console to create and receive return orders.

Structure

This manual contains the following sections:

Chapter 1, "Reverse Logistics Overview"
This chapter explains the basic functionality of the Sterling Reverse Logistics Console.

Chapter 2, "Performing a Return Service Request"
This chapter explains the task of performing a return service request.

Chapter 3, "Entering a Resource's Route"
This chapter explains the task of entering a resource's route for a given day.

Chapter 4, "Adding or Removing Service Tools to a Service Work Order"
This chapter explains the task of adding or removing service tools on a service work order.

Chapter 5, "Determining Whether an Area is Serviced"
This chapter explains the task of search for a serviced area.

Chapter 6, "Taking an Appointment on a Service Work Order"

This chapter explains the task of taking appointments on an existing service work order.

Chapter 7, "Managing Team Members on Service Work Order Appointments"

This chapter explains the task of managing team members for service work order appointments.

Chapter 8, "Return Console Screens"

This chapter explains the screens for viewing and modifying return order information.

Chapter 9, "Create Return Order Screens"

This chapter explains the screens for creating orders and draft return orders.

Chapter 10, "Create Return Shipment Screens"

This chapter explains the screens for creating a return shipment.

Chapter 11, "Return Shipment Console Screens"

This chapter explains the screens for viewing and modifying return shipment information.

Chapter 12, "Service Work Order Console Screens"

This chapter explains the screens for viewing and modifying service work orders.

Chapter 13, "Serviced Area Search Screens"

This chapter explains how to find out whether a certain zip code is serviced by a resource pool.

Chapter 14, "Route Entry Screens"

This chapter explains how to plan a resource pool's route for its appointments throughout the day.

Selling and Fulfillment Foundation Documentation

For more information about Selling and Fulfillment Foundation components, see the following manuals:

- *Selling and Fulfillment Foundation: Release Notes*
- *Selling and Fulfillment Foundation: Installation Guide*
- *Selling and Fulfillment Foundation: Upgrade Guide*
- *Selling and Fulfillment Foundation: Configuration Deployment Tool Guide*
- *Selling and Fulfillment Foundation: Performance Management Guide*
- *Selling and Fulfillment Foundation: High Availability Guide*
- *Selling and Fulfillment Foundation: System Management Guide*
- *Selling and Fulfillment Foundation: Localization Guide*
- *Selling and Fulfillment Foundation: Customization Basics Guide*
- *Selling and Fulfillment Foundation: Customizing APIs Guide*
- *Selling and Fulfillment Foundation: Customizing Console JSP Interface for End User Guide*
- *Selling and Fulfillment Foundation: Customizing the RCP Interface Guide*
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- *Selling and Fulfillment Foundation: Extending Transactions Guide*
- *Selling and Fulfillment Foundation: Using Sterling RCP Extensibility Tool Guide*

- *Selling and Fulfillment Foundation: Integration Guide*

- *Selling and Fulfillment Foundation: Product Concepts Guide*

- *Sterling Warehouse Management^{TM} System: Concepts Guide*

- *Selling and Fulfillment Foundation: Application Platform Configuration Guide*

- *Sterling Distributed Order Management^{TM}: Configuration Guide*

- *Sterling Supply Collaboration: Configuration Guide*

- *Sterling Global Inventory Visibility^{TM}: Configuration Guide*

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- *Sterling Logistics Management: Configuration Guide*

- *Sterling Reverse Logistics^{TM}: Configuration Guide*

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- *Selling and Fulfillment Foundation: Mobile Application User Guide*

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- *Selling and Fulfillment Foundation: Javadocs*

- *Sterling Selling and Fulfillment Suite^{TM}: Glossary*

- *Parcel Carrier: Adapter Guide*

- *Visual Modeler^{TM}: Application Guide*

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- *Selling and Fulfillment Foundation: Password Policy Management Guide*

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- *Sterling Sensitive Data Capture Server, Release 1.0: Configuration Guide*

- *Sterling Sensitive Data Capture Server, Release 1.0: PA-DSS Implementation Guide*

- *Selling and Fulfillment Foundation: Secure Deployment Guide*

- *Business Center: Item Administration Guide*

- *Business Center: Pricing Administration Guide*

- *Business Center: Customization Guide*

- *Business Center: Localization Guide*

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Convention	Meaning
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< >	Angle brackets indicate user-supplied input.
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<YANTRA_HOME>	User-supplied location of the Sterling Supply Chain Applications installation directory. This is only applicable for Releases 7.7, 7.9, and 7.11.
<YANTRA_HOME_OLD>	User-supplied location of the Sterling Supply Chain Applications installation directory (for Releases 7.7, 7.9, or 7.11). **Note:** This is applicable only for users upgrading from Releases 7.7, 7.9, or 7.11.
<YFS_HOME>	For Releases 7.3, 7.5, and 7.5 SP1, this is the user-supplied location of the Sterling Supply Chain Applications installation directory. For Releases 7.7, 7.9, and 7.11, this is the user-supplied location of the <YANTRA_HOME>/Runtime directory. For Release 8.0 and later, the <YANTRA_HOME>/Runtime directory is no longer used and has been substituted with the location <INSTALL_DIR>.
<YFS_HOME_OLD>	This is the <YANTRA_HOME>/Runtime directory for Releases 7.7, 7.9, or 7.11. **Note:** This is only applicable for users upgrading from Releases 7.7, 7.9, or 7.11.
<ANALYTICS_HOME>	User-supplied location of the Sterling Analytics installation directory. **Note:** This convention is used only in the *Selling and Fulfillment Foundation: Business Intelligence Guide*.

Convention	Meaning
<COGNOS_HOME>	User-supplied location of the IBM Cognos 8 Business Intelligence installation directory. **Note:** This convention is used only in the *Selling and Fulfillment Foundation: Business Intelligence Guide*.
<MQ_JAVA_INSTALL_ PATH>	User-supplied location of the IBM WebSphere® MQ Java components installation directory. **Note:** This convention is used only in the *Selling and Fulfillment Foundation: System Management and Administration Guide*.
<DB>	Refers to Oracle®, IBM DB2®, or Microsoft SQL Server® depending on the database server.
<DB_TYPE>	Depending on the database used, considers the value oracle, db2, or sqlserver.

Note: The Selling and Fulfillment Foundation documentation set uses the following conventions in the context of the product name:

- Yantra is used for Release 7.7 and earlier.

- Sterling Supply Chain Applications is used for Releases 7.9 and 7.11.

- Sterling Multi-Channel Fulfillment Solution is used for Releases 8.0 and 8.2.

- Selling and Fulfillment Foundation is used for Releases 8.5 and 9.0.

1

Reverse Logistics Overview

Reverse Logistics enables access to returns information.

Selling and Fulfillment Foundation: Product Concepts Guide introduces concepts regarding reverse logistics. The *Sterling Warehouse Management System: User Guide* builds on that guide and explains how to use the Return Console to process returns.

The Reverse Logistics module consists of the following software components:

- **Create Return Order Console** - enables you to create return orders, blind returns and exchange orders. The screen level information is explained in Chapter 9, "Create Return Order Screens".

- **Return Order Console** - enables you to view return order details, return order alerts, return order releases, return order invoice details, return order instructions and notes. The screen level information is explained in Chapter 8, "Return Console Screens".

- **Create Return Shipment** - enables you to create a return shipment and setting up shipment supervisory overrides. The screen level information is explained in Chapter 10, "Create Return Shipment Screens".

- **Return Shipment Console** - enables you to track return shipments and container and so on. The screen level information is explained in Chapter 11, "Return Shipment Console Screens".

- **Service Work Order Console** - enables you to view the service work order related information. You can plan new appointments, add provided or delivery services or modify existing work orders. The screen level information is explained in Chapter 12, "Service Work Order Console Screens".

- Serviced Area Search - enables you to search by zip code and determine whether a service is available for a specific area. The screen level information is explained in Chapter 5, "Determining Whether an Area is Serviced".

- **Route Entry -** enables you to enter a resource's route. The screen level information is explained in Chapter 14, "Route Entry Screens".

Part I
Return Order Tasks

The chapters in this section provide an in-depth explanation of the various tasks that can be performed in the Return Order Console screens.

This section contains the following chapters:

- Performing a Return Service Request
- Entering a Resource's Route
- Adding or Removing Service Tools to a Service Work Order
- Determining Whether an Area is Serviced
- Taking an Appointment on a Service Work Order
- Managing Team Members on Service Work Order Appointments

2

Performing a Return Service Request

Selling and Fulfillment Foundation provides the capability to associate provided service requests with a return order. This chapter explains the various activities related to performing a return service request and how you can perform them. It covers the following use cases:

- Searching for Return Service Requests

- Viewing Service Request Details

- Adding Instructions to a Service Request

- Viewing Additional Addresses

2.1 Searching for Return Service Requests

The following Return Service Request screens let you search for return service requests based on different criteria:

- Return Service Request Search By All Attributes - You can search for service requests by all attributes in this screen. screen

- Return Service Request Search By Draft Returns screen

To navigate to the search screens:

1. From the navigation bar, choose Reverse Logistics > Return Console. Initially, the Return Service Request Search By All Attributes - You can search for service requests by all attributes in this screen. screen displays. Select the applicable search view from the Views drop-down list.

2. Enter information in the applicable fields.

3. Click Search. The search results display in the Service Request List screen.

2.2 Viewing Service Request Details

You can view service request details using the Service Request Details screen.

To view the service request details:

1. From the Service Request List screen, select the checkboxes of the applicable service requests.

2. From the action bar, click View Details. The Service Request Details screen displays.

2.3 Adding Instructions to a Service Request

You can add instructions to a service request using the Service Request Instructions screen.

To add instructions to a service request:

1. From the Service Request List screen, select the checkboxes of the applicable service requests.

2. From the action bar, click View Instructions. The Service Request Instructions screen displays.

3. Enter information in the applicable fields.

4. Click Save.

2.4 Viewing Additional Addresses

You can view additional service request addresses using the More Service Request Addresses screen.

To view additional service request addresses:

1. From the Service Request List screen, select the checkboxes of the applicable service requests.

2. From the action bar, click More Addresses. The More Service Request Addresses screen displays.

3

Entering a Resource's Route

Typically, a resource has to perform more than one service on a given day. The sequence in which services are completed can be determined ahead of time to ensure an optimal route with the minimum amount of time and distance in between each stop.

If you have already determined your resource's route for a day, you can use the route entry functionality of Selling and Fulfillment Foundation to record which stop number corresponds to which appointment.

This can be done in the following steps:

1. Searching for Service Work Order Appointments

2. Viewing Service Work Order Appointments

3. Assigning Stop Numbers To Appointments for a Resource

3.1 Searching for Service Work Order Appointments

To search for service work order appointments:

1. From the navigation bar, select Order > Route Entry. The Work Order Appointments Search screen displays.

2. Enter the search criteria for the service work order as applicable. For more information about this search criteria, see Table 12–1.

3. When you have entered the applicable information, click `Search`. The Route Entry screen displays.

3.2 Viewing Service Work Order Appointments

If no resource pool has been selected as part of the search criteria in the Work Order Appointments Search screen, all the appointments for all resource pools are listed for the selected date. Each inner panel corresponds to a resource pool, with the pool's name as the title.

3.3 Assigning Stop Numbers To Appointments for a Resource

To assign stop numbers for appointments:

1. In the Resource column, select the resource that carries out this appointment from the drop-down list.

2. In the Stop # column, enter the stop number for the appointment.

3. In the Expected Start Time column, enter the time when the appointment is expected to start, or click the 🕐 icon and select it from the pop-up window.

4. In the Expected End Time column, enter the time when the appointment is expected to end, or click the 🕐 icon and select it from the pop-up window.

5. Once you are satisfied with your route, click Save.

4

Adding or Removing Service Tools to a Service Work Order

Some service work orders may require special tools such as a ladder or a tool kit to perform the service. Selling and Fulfillment Foundation lets you associate one or more service tools to a service work order.

This task assumes that a service work order has already been created. Service tools can be added to the service work order before the appointment, as a planning activity, or afterwards, to keep track of which tools service work orders generally require.

This can be in done in the following steps:

1. Searching for a Service Work Order
2. Viewing Service Tools for a Service Work Order
3. Adding or Removing Service Tools for a Service Work Order

4.1 Searching for a Service Work Order

To search for applicable service work orders:

1. From the navigation bar, select Order > Service Work Order Console. The Work Order Search By All Attributes screen displays.
2. Enter the search criteria for the work order as applicable. For more information about this search criteria, see Table 12–1.
3. When you've entered the applicable information, click `Search`. The Work Order List screen displays.
4. Select the checkbox of the service work orders for which you want to view details, and click the `View Details` action. The Work Order

Details screen displays where you can view details for the service work order you selected.

4.2 Viewing Service Tools for a Service Work Order

From the Work Order Details screen, you can view the service tools that can be associated with the service work order.

In the Primary Information inner panel, click the ▓ icon. The Service Tools screen displays. The Service Tools inner panel displays the service tools that can be associated with the service work order.

4.3 Adding or Removing Service Tools for a Service Work Order

From the Service Tools screen, you can add or remove service tools for the service work order.

Adding Service Tools to a Service Work Order

To add a service tool to a service work order:

1. Check the checkbox next to the identifier of the service tool.

   This enables the `Required Quantity` and `Comments` text boxes.

2. If necessary, enter the required quantity, and any additional comments.

3. Click `Save`.

Removing Service Tools from a Service Work Order

To remove a service tool from a service work order:

1. Uncheck the checkbox next to the identifier of the service tool you want to remove.

2. Click `Save`.

5

Determining Whether an Area is Serviced

If a customer walks into your store and wants to know whether his postal code is serviced by your store for a given type of service, you can use the Serviced Area Search console to find out that information.

This assumes that you are able to map the requested service to a service type as defined in the Applications Manager.

This can be done in the following steps:

1. Searching for a Serviced Area
2. Viewing the Available Time Slots for the Service

5.1 Searching for a Serviced Area

To search for a serviced area:

1. From the navigation bar, select Order > Serviced Area Search. The Serviced Area Search screen displays.

2. Enter the search criteria for the service work order as applicable. For more information about the search criteria, see Table 13–1.

3. When you have entered the applicable information, click `Search`. The Serviced Area List screen displays.

5.2 Viewing the Available Time Slots for the Service

You can view the available time slots for the requested service and postal code combination in the Serviced Area List screen.

Selling and Fulfillment Foundation looks for capacity across all the resource pools for the specified Enterprise. If slots are available for the requested postal code, the Available Slots inner panel displays.

Each time slot displays as a row, and each day of the week as a column. The boxes show whether or not the requested postal code can be serviced for each time slot, each day, as follows:

- If the requested postal code is serviced for the day of the week, and capacity is available, a green checkmark appears.

- If the requested postal code is serviced for the day the week, but capacity is not available, a red cross appears.

- If the requested postal code is not ever serviced for the day of the week, a grey background appears, with no icon on top of it.

6

Taking an Appointment on a Service Work Order

Once a service work order has been created, an appointment has to be taken for the service to be completed.

When taking the appointment, there can be additional factors such as considering supplemental capacity or trying to schedule a customer's appointments against his preferred time slots.

This can be in done in the following steps:

1. Searching for a Service Work Order

2. Viewing Planned Appointments

3. Taking an Appointment

6.1 Searching for a Service Work Order

To search for applicable service work orders:

1. From the navigation bar, select Order > Service Work Order Console. The Work Order Search By All Attributes screen displays.

2. Enter the search criteria for the work order as applicable. For more information about this search criteria, see Table 12–1.

3. When you have entered the applicable information, click `Search`. The Work Order List screen displays.

4. Select the checkbox of the service work orders for which you want to view details, and click the `View Details` action. This takes you to the Work Order Details screen for the service work order you selected.

6.2 Viewing Planned Appointments

To view planned appointments:

1. In the Work Order Details screen, go to the Open Appointments inner panel.

2. If you are in a multiple appointments context, select the appropriate work order and click the `View Execution Details` action. Otherwise, click the `View Execution Details` action. This takes you to the "Execution Details" screen.

6.3 Taking an Appointment

When taking an appointment for a service work order, there are some considerations you might want to think about. For example, supplemental capacity, node notification time, or preferred customer slot.

Considering Supplemental Capacity

The Supplemental capacity may be defined for the selected resource pool.

Selling and Fulfillment Foundation can be configured to automatically consider that extra capacity every time an appointment is taken for certain preferred customers. If that is not the case, however, and you want to consider supplemental capacity on a single appointment, check the `Consider Supplemental Capacity` checkbox in the Override inner panel.

Considering Node Notification Time

Ship nodes generally require a certain notification time for them to be able process a service request. If this is a high priority service request, you can ignore that minimum notification time for the node. To do this, check the `Ignore Node Notification Time` checkbox in the Override inner panel.

Considering Product Availability

Selling and Fulfillment Foundation considers product availability when displaying the available appointment slots. If there is no product availability during an appointment slot, that slot is not available.

Clicking on the Product Availability action in the Constraints inner panel takes you to the Product Availability screen, where you can use the Change Nodes action to specify a different ship node or procure from node if there is no product availability at the current ship node.

You can also check the Ignore Product Availabilty checkbox in the Override inner panel to remove this restraint and plan appointments without considering product availability.

Awaiting Procurement Confirmation

If configured, Selling and Fulfillment Foundation enables the procure from node to manually confirm transfer requests. While product lines are awaiting confirmation from the procure from node, the message "Few Prod Lines Are Awaiting Procurement Confirmation" is displayed in the Constraints inner panel.

Clicking on the Product Availability action in the Constraints inner panel takes you to the Product Availability screen, where you can use the Change Nodes action to specify a different procure from node that may not require procurement confirmation.

You can also check the Ignore Product Availabilty checkbox in the Override inner panel to remove this restraint and plan appointments without considering product availability.

Selecting the Time Slot

To select the date from which you want to start looking at available appointment slots:

1. In the Available Slots inner panel, click the ▦ icon in the Start Date field.

2. Enter how far you into the future you want to look for appointments in the Number Of Days To Consider field.

3. Once you are satisfied with the search parameters, click GO. A grid with time slots and days displays.

4. Select any time slot on the grid where a ➕ icon is displayed. If the buyer on the order is a preferred customer and preferred time slots have been defined for that customer, they are marked by a ➕ icon instead.

5. Once you have selected the appropriate appointment slot, click the `Save Appointment` action in the Work Order inner panel, and the appointment is saved.

If a Preferred Resource Pool ID and a Preferred Resource ID were specified on the Capacity Information panel of the Work Order Details screen, they are populated in the Override inner panel in this screen. You may, however, change them if no available slots are found, or if the slots that were found did not accommodate the customer's schedule.

7

Managing Team Members on Service Work Order Appointments

A team member is an individual to whom the execution of the service work order appointment is assigned.

Typically, a service resource is composed of several team members. These team members are defined for each resource in the Applications Manager. When taking service work order appointments, Selling and Fulfillment Foundation automatically assigns the resource's team members to the appointment, if they have been defined, and the resource has been selected in the service work order details.

Managing team members on your service work order appointments can offer benefits such as facilitating integration with financial systems to ease payroll processing.

This task assumes that a service work order has already been created and an appointment has already been taken for it.

You have, however, the flexibility to change the assigned team members on service work order appointments.

This can be accomplished by:

- Changing the Team Members for Service Work Order Appointments

  or

- Overriding Team Members for Service Work Order Appointments

7.1 Changing the Team Members for Service Work Order Appointments

Changing team members on an appointment involves adding or removing a team member to or from an existing list for any number of appointments in a single service work order. For instance, this could be used to replace a team member that is on sick leave with another member.

This can be done in the following steps:

1. Searching for a Service Work Order

2. Viewing the Team Members

3. Adding or Removing the Team Members

7.1.1 Searching for a Service Work Order

To search for applicable service work orders:

1. From the navigation bar, select Order > Service Work Order Console. The Work Order Search By All Attributes screen displays.

2. Enter the search criteria for the work order as applicable. For more information about the search criteria, see Table 12–1.

3. When you have entered the applicable information, click `Search`. This takes you to the Work Order List screen.

4. Select the checkbox of the service work orders for which you want to view details, and click the `View Details` action. This takes you to the Work Order Details screen for the service work order you selected.

7.1.2 Viewing the Team Members

To view the team members currently assigned to an appointment:

1. From the Work Order Details screen, go to the Open Appointments inner panel.

2. Click the `View Execution Details` action.

   In the case of multiple appointments, select the appointments for which you want to manage team members, and click the View Execution Details action.

The Execution Details screen displays in a pop-up window.

The Team Members inner panel displays the team members currently assigned to this appointment. If a Resource Pool ID and a Resource ID have been specified in the Capacity Information inner panel of the Work Order Details screen, and team members have been defined for that resource in the Applications Manager, they are automatically populated in the Execution Details screen.

7.1.3 Adding or Removing the Team Members

You can add or remove team members to your appointment.

Adding a Team Member

To add a team member to an appointment:

1. Click the ➕ icon in the Team Members inner panel.

2. In the text box, enter the identifier of the team member or click the 🔎 icon to look it up.

3. If you are ready to add the team member, click Save. If you do not want to add the team member, click the ✖ icon.

Removing a Team Member

To remove one or more team members from this appointment:

1. Select the checkbox of the team members you want to remove.

2. Click the Remove action in the Team Members inner panel.

7.2 Overriding Team Members for Service Work Order Appointments

Overriding team members for service work order appointments overwrites the current list of members with a new one. Therefore, this feature cannot be used to add or remove a team member from a pre-existing list. However, you can do this for a number of appointments for different service work orders at once.

This can be done in the following steps:

1. Searching for Service Work Order Appointments

    2. Viewing Service Work Order Appointments

    3. Creating the New List of Team Members

7.2.1 Searching for Service Work Order Appointments

To search for service work order appointments:

1. From the navigation bar, select Order > Route Entry. The Work Order Appointments Search screen displays.

2. Enter the search criteria for the service work order as applicable. For more information about the search criteria, see Table 12–1.

3. When you've entered the applicable information, click Search. This takes you to the Route Entry screen.

7.2.2 Viewing Service Work Order Appointments

If no resource pool has been selected as part of the search criteria in the Work Order Appointments Search screen, all the appointments for all resource pools are listed for the selected date. Each inner panel corresponds to a resource pool, with the pool's name as the title.

7.2.3 Creating the New List of Team Members

To override Team Members for appointments and create a new list:

1. Select the appointments for which you want to override the team members.

2. Click the Override Team Members action. The Override Team Members screen displays in a pop-up window.

3. In the Override Team Members screen, click the ➕ icon. In the text box, enter the identifier of the team member or click the 🔍 icon to look it up. If you want to remove a team member from your new list, click the ✖ icon.

4. Once you are satisfied with your list, click Save.

Part II

Return Order Screen Reference

The chapters in this section provide screen and field descriptions for all Return Order Console screens.

This section contains the following chapters:

- Create Return Order Screens
- Return Console Screens
- Create Return Shipment Screens
- Return Shipment Console Screens
- Service Work Order Console Screens
- Serviced Area Search Screens
- Route Entry Screens

8

Return Console Screens

The Return Console provides access to information about returns. Users can view return order information to inspect returned items, determine how returned items should be handled, and provide the Buyer with the necessary amount of credit for the return.

Several types of searches can be performed from the Return Console's Search window.

8.1 Return Search By Status

You can search for a return order based on its status in this screen.

> **Note:** Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 8–1   Return Search by Status

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Across Enterprises	Select this option if you are searching across all enterprises.
Return #	Enter the return number you are searching for, if applicable.

Table 8–1   Return Search by Status

Fields	
Order #	Enter the order number from which the returns you are searching for were created, if applicable.
Return Date	Enter the date the return you are searching for was entered, if applicable.
Buyer	Enter the Buyer associated with the returns you want to search for, if applicable.
Seller	Enter the Seller associated with the returns you want to search for, if applicable.
Return Line Status	Select the status range of the returns you want to search for, if applicable.
Held Returns	Select if the returns you are searching for are being held.
Hold Reason Code	If you selected Held Returns, then select the reason code the returns you are searching for are associated with.
Return Order State	Select to search for returns in one of the following conditions: • Open - returns that have not been closed • Recent - all returns (open and closed) that have not yet been purged to the history tables • History - returns that have been purged to the history tables • All - all returns (open, recent, and history)
Max Records	Enter the maximum number of returns you want returned from your search.

The Return Order List screen is displayed as a result of this status search.

8.2 Return Search By Item

You can search for return orders by the item information included in the return with the help of this screen.

> **Note:** Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 8–2   Return Search by Item

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Across Enterprises	Select this option if you are searching across all enterprises.
Return #	Enter the return number you are searching for, if applicable.
Order #	Enter the order number from which the returns you are searching for were created, if applicable.
Item ID	Enter the item ID to search for returns containing a specific item, if applicable.
Product Class	Select an item product class to search for returns containing an item that has a specific product class, if applicable.
Unit of Measure	Select an item unit of measure to search for returns containing an item that has a specific unit of measure, if applicable.
Line Type	Select a line type to search for returns containing an item that has a specific line type, if applicable.
Return To Node	Enter the return node under which you want to search for returns, if applicable.
Max Records	Enter the maximum number of returns you want returned from your search.

The Return Order List screen is displayed as a result of this search.

8.3 Return Search by Draft Returns

You can search for draft returns using this screen.

> **Note:** Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 8–3   Return Search by Draft Returns

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Across Enterprises	Select this option if you are searching across all enterprises.
Return #	Enter the draft return number you are searching for, if applicable.
Order #	Enter the order number from which the draft returns you are searching for were created, if applicable.
Buyer	Enter the Buyer associated with the draft returns you are searching for, if applicable.
Buyer Account #	Enter the Buyer account number associated with the draft returns you are searching for, if applicable.
Seller	Enter the Seller associated with the draft returns you are searching for, if applicable.
Max Records	Enter the maximum number of draft returns you want returned from your search.

The Return Order List screen is displayed as a result of this status search.

8.4 Return Order List

The Return List window displays the results of a return search. You can perform actions on a single return or multiple returns by selecting the check boxes of the returns you want to perform an action on and choosing the applicable action from the action bar.

Table 8–4   Return List

Actions	
View Details	This action takes you to the Return Detail screen where you can view the details of the selected return orders.
View Alerts	This action takes you to the Return Alerts screen where you can view the alerts raised by the selected return orders.
View Releases	This action takes you to the Return Releases For Order screen where you can view the releases associated with the selected return orders.
View Invoices	This action takes you to the Return Invoices screen where you can view the invoices associated with the selected return orders.
View Instructions	This action takes you to the Return Instructions screen where you can view the instructions associated with the selected return orders.
View Notes	This action takes you to the Notes screen where you can view the relevant notes associated with the selected return orders.
View Audit	This action takes you to the Return Audits screen where you can view the audits associated with the selected return orders.
Cancel	This action lets you cancel the selected return orders. An alert window pops up to confirm the changes. However, you cannot cancel a return that has been released.
Remove Order	This action lets you remove the selected return orders. An alert window pops up to confirm the changes
View Holds	This action takes you to the View Holds screen where you can view, add, modify or remove the holds associated with the selected return orders.

Table 8–4   Return List

Fields	
Return #	The return number. Click this link to view the details of the return order in the Return Detail screen.
Status	The current status of the return. If a history icon appears here, the return is a history return.
Enterprise	The Enterprise associated with the return.
Buyer	The Buyer organization that created the return.
Order Date	The date the return was created.
Total Amount	The return's total amount.

8.5 Return Detail

The return detail screen provides various information about a single return order. The actions that can be performed in the return detail screen are explained in the following tables:

Table 8–5   Return Detail Screen, Return

View Icons	
	Active Alerts - This icon takes you to the Return Alerts screen where you can view the alerts for the return order.
	More Attributes - This icon takes you to the More Return Attributes screen where you can specify other attributes for the return order.
	Releases - This icon takes you to the Return Releases For Order screen where you can view the list of return releases based on the release number, ship node and status.
	Work Orders - This icon takes you to the Work Orders screen where you can view the related work orders associated with this return order.
	Invoices - This icon takes you to the Return Invoices screen to view the return invoices.

Table 8–5   Return Detail Screen, Return

	Shipments - This icon takes you to the Return Shipments screen where you can view the shipment and container details.
	Instructions - This icon lets you view the Return Instructions screen where you can add, modify or delete the instructions for the return.
	More Addresses - This icon takes you to the Additional Order Addresses screen where you can add or modify return address.
	Return Audits - This icon takes you to the Return Audits screen where you can view the list of audits done for that return order.
	Notes - This icon lets you view the Notes where you can add the notes for a return.
	If notes have been added, the ⟩ icon is displayed instead.
	Payment Information - This icon takes you to the Return Payment Information screen where you can view the payment information for the return order. You can also add or create payment types, debit or credit memos in this screen.
	View Collection Details - This icon takes you to the Collection Details screen where you can view the collection details for the return order.
	Related Orders - This icon lets you view the Related Orders screen. For example you can view the Return Orders created from the return console by clicking this icon.
	Receipts - This icon takes you to the Return Receipt List screen where you can view the receipts and perform associated actions for the given return order.
	Order Dates - This icon takes you to the Return Dates screen to view the requested, expected and actual date type for the given return.
Actions	
Confirm	This action lets you confirm the **Draft** orders.
Cancel Open Quantity	This action converts the quantity of return lines to zero provided they are in the **Draft** status.

Table 8–5   Return Detail Screen, Return

Authorize	This action takes you to the Authorize Return screen for authorizing the return order.
Release	You can release the return using this action.
Add Pickup Request	This action takes you to the Add Pickup Request screen where you can add the necessary pickup requests for the return.
Add Service Request	This action enables you to add stand-alone (not associated with order lines) provided service items. This action takes you to the Service Request Search By Item screen where you can search for service requests you want to add to the return order. For more information about the Service Request Search By Item screen, see the *Sterling Distributed Order Management: User Guide*.
Report/Record Receipt	This action takes you to the Receive screen where you can perform associated actions to receive the return.
	If you do not have a receipt for the return order, clicking this action takes you to the Start Receipt screen.
Create Derived Return Order	This action lets you create derived return orders for the return lines. This action takes you to the Order Entry screen to create an exchange order.
View Holds	This action lets you view, add or remove return holds. For more information, refer to View Holds screen for field level descriptions of the screen.
Create Work Order	This action lets you create service work order for the order lines. Upon clicking this action you are taken to the Work Order Entry Screen screen where you can enter the relevant information for creating a work order.
Fields	
Enterprise	The Enterprise associated with the return.
Buyer	The Buyer organization that placed the return. This field can be edited if the return is in **Draft Created** status. In any other status, click this link to view the Organization Details screen of the buyer.

Table 8–5   Return Detail Screen, Return

Seller	The Seller organization that is handling the return. This field can be edited if the return is in **Draft Created** status. In any other status, click this link to view the Organization Details screen of the buyer.
Return #	The return number.
Status	The current status of the return. Click this link to view the Return Status Breakup screen.
Return Date	The date the return was placed.
Return Type	This field can be customized as needed.
Currency	The currency of the return payment options.
Return Against Order	This field indicates if the return order is created against a sales order. Valid values are Y or N.
Document Type	The document type associated with the order. For example, Return Order is a document type.
Exchange Type	Select the exchange type from the drop-down list. The option of changing the type of an exchange is only available when the order is in `Draft Order Created` status. Once the order is confirmed, you are not able to edit this field. **Note:** This field is only displayed for exchange orders.
Created For Return #	The return order number for which the exchange was created. Click on the hyperlink to see that return order. **Note:** This field is only displayed for exchange orders.

Table 8–6   Return From

View Icon	
	Address Details - Choose this icon to view or modify the Return From addresses. For more information about the screen that is displayed, refer to Modify Return From Address.

Table 8–6   Return From

🗫	**Additional Address Questions** - Choose this icon to view or modify answers to address questions for this ship to address. If any questions have already been answered, a 🗫 icon is displayed. For more information about the screen that is displayed, refer to the Questions screen.
The name and address of the person or organization from where the product is being returned.	

Table 8–7   Return To

View Icon	
🔍	**Address Details** - Choose this icon to view or modify the Return To addresses. For more information about the screen that is displayed, refer to Organization Address Details Screen.
The name and address of the person or organization where the order is to be returned.	

Table 8–8   Return Detail Screen, Charges

View Icon	
🟢	**Charges and Taxes** - This icon takes you to the Return Refund Summary screen to view the summary of the return charges, fees and their tax breakup.
Fields	
Line Sub-Total	The total of all of the line item totals.
Total Charges	The total amount of extra charges for the order. For example, shipping, handling, and personalization charges.
Total Tax	The total tax amount for the order.
Total Fees	The total fee amount that is being applied to the order.

Table 8–8   Return Detail Screen, Charges

Grand Total	The final total, including all extra charges, taxes, and discounts.
Invoiced	The invoiced amount.
Balance	The difference between the Grand Total and Invoiced amount.

The view icons shown in the Return Detail Screen, Return Lines table appear along the side of each order line before the line number.

Table 8–9   Return Detail Screen, Return Lines

View Icons	
	Line has Service Requests that can be added - This icon identifies a return line that can be associated with one or more provided service requests. Click this icon to associate a provided service request with the order line. For more information, refer to Associate Service Request.
	Line Has Associated Service Requests - This icon identifies a return line that has one or more service requests associated with it. Click this icon to view the provided service requests associated with the order line. For more information, refer to Associated Service Requests.
	Pickup Request needs to be added - This icon identifies a return line that must be associated with a pickup request. By clicking this icon, you can view the pickup requests that can be associated with the order. For more information, refer to Add Pickup Request.
	View Work Orders - This icon identifies a return line that has one or more work orders associated with it. By clicking this icon, you can view the work orders associated with this order. For more information, refer to Work Order Details.
	Related Lines - This icon identifies a return line that is related to one or more other order lines. By clicking this icon, you can view the associated related order lines. For more information, refer to Related Order Lines.

Table 8–9   Return Detail Screen, Return Lines

	This is a Gift Line - This icon identifies an order line that is a gift.
	Instructions - This icon identifies an return line that has one or more instructions associated with it. By clicking this icon, you can view the return line's instructions. For more information, refer to Return Line Instructions.
	Kit Components - This icon identifies an return line that is a kit. By clicking this icon, you can view the return line's kit components. For more information, refer to Kit Components.
Actions	
View Details	This action takes you to the Return Line Detail screen for the selected return lines.
Add Order Line	This action takes you to the screen where you can lookup orders that contain returnable order lines for the selected return lines.
View Audits	This action takes you to the Return Line Audits screen which stores the audit information for the selected return lines.
Fields	
Line	The return line number.
Derived From Order	The order from which the line is derived.
Item ID	The item ID.
PC	The item classification such as first quality, second quality, or finished good.
UOM	The item's unit of measurement.
Description	A description of the item.
Reason Code	A drop-down list of reasons why the item was returned.
Line Type	The line type.
Return To Node	The node handling the return.

Table 8–9   Return Detail Screen, Return Lines

Line Qty	The quantity of the line item. Entering '0' indicates a quantity of zero. Leaving this field blank indicates you want to ignore the line.
	This field can be modified.
Amount	The amount the Buyer is charged for the line.
Status	The current status of the return line.

You can view the pickup requests associated with the product line in this panel. The view icons shown in the Return Detail Screen, Pickup Request table appear along the side of each pickup request before the line number.

Table 8–10   Return Detail Screen, Pickup Request

View Icons	
	View Work Orders - This icon identifies the work orders associated with the pickup request. For more information, refer to Work Order Details.
	Instructions - This icon identifies one or more instructions associated with the pickup request. For more information, refer to Pickup Request Instructions.
Actions	
View Details	This action takes you to the Pickup Request Details screen for the selected pickup request.
View Instructions	This screen takes you to the Pickup Request Instructions screen where you can create, modify or delete instructions for the pickup request.
Cancel	This action lets you cancel the selected pickup requests. A modification reason screen pops up, after you enter the reason code and press OK, the pickup request is cancelled.
Remove	This action lets you remove pickup requests when they are in the **Draft** Status.
Add Line	This action takes you to the Additional Product Lines screen where you can associate additional product lines to the pickup service.

Table 8−10   Return Detail Screen, Pickup Request

Fields	
Line	The order's line. Click this link to view the Pickup Request Details screen.
Derived From Order	The order from which the line is derived.
Item ID	The pickup item's ID.
Ship Node	The node from which this pickup is carried out.
Description	The description of the pickup.
Appointment	The date and time of the pickup.
Amount	The amount of the pickup.
Status of Associated Product	The status of the pickup line. This is same as the return line status.

You can view the service requests associated with the product line in this panel. The view icons shown in the Return Detail Screen, Service Requests table appear along the side of each service request before the line number.

Table 8−11   Return Detail Screen, Service Requests

View Icons	
	View Work Orders - This icon identifies the work orders associated with the service request. For more information, see Work Order Details.
	Instructions - This icon identifies one or more instructions associated with the service request. For more information, see Service Request Instructions.
Actions	
View Details	This action takes you to the Service Request Details screen where you can view the details of the selected service request.
View Instructions	This action takes you to the Service Request Instructions screen where you can create, modify or delete instructions for the selected service request.

Table 8–11   Return Detail Screen, Service Requests

Cancel	This action lets you cancel the selected service requests. In the Modification Reason screen that pops up, enter the reason code and reason text, and click OK to cancel the service request.
Remove	This action lets you remove service requests that are in draft status.
Fields	
Line	The line of the order. Click this link to view the Service Request Details screen where you can view the details of the selected service request.
Derived From Order	The order from which the line is derived.
Item ID	The item identifier of the service.
Description	The description of the service.
Appointment	The date and time of appointment.
Return To Node	The node handling the return.
Amount	The amount of the service.
Status	The status of the service line. This is the same as the return line status.

8.6 Return Alerts

You can view the alerts associated with the return orders in this screen.

Table 8–12   Return

Fields	
Enterprise	The Enterprise associated with the return.
Buyer	The Buyer organization that placed the return.
Seller	The Seller organization that is handling the return.
Return #	The return number.
Status	The current status of the return. Click this link to view the Return Status Breakup screen.
Return Date	The date the return was placed.
Return Type	This field can be customized as needed.

Table 8–12   Return

Fields	
Currency	Monetary denomination used.
Return Against Order	Indicates whether or not the return was created against an order.
Exchange Order	The number of the exchange order that was created for this return. Click on the hyperlink to see that exchange order. **Note:** This field is only displayed if an exchange order has been created for this return.

Table 8–13   Return Alerts Screen, Alert

Action	
View Details	This action takes you to the Alert Detail screen to view the details of the alert raised. For more information about using the Alert Console, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Fields	
Alert ID	The alert ID. Click this link to view the alert details.
Type	The type of alert raised. For example, ON_FAILURE or FAILED_AUTH.
Description	A brief description of the alert.
Queue	The queue the alert has been assigned to.
Priority	The alert priority.
Owner	The user who is handling the alert.
Raised On	The date the alert was raised.

8.7 More Return Attributes

You can view additional information related to a return in this screen.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–14   More Return Attributes Screen, Other Attributes

Fields	
Return Name	The return name. This field can be used as per your business practices.
Entered By	This field displays the user ID of the user who entered the return. This field can be modified.
Source	The method of order entry. For example, web site, kiosk. This field can be modified.
Created At Node	The node the return was created at.
Return To Node	The node handling the return.
Price Program	Select the price program used to determine the pricing of the items on the return.
Return By Gift Recipient	Check this if items are being returned by the gift recipient of the original order.

Enter the relevant information and click Save to update the changes.

8.8 Return Releases For Order

You can view the individual releases that have been sent to the nodes scheduled to fulfill a return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–15   Return Releases For Order Screen, Return Releases

Action	
View Details	This action takes you to the Return Release Details screen for the selected releases.
Fields	

Table 8–15   Return Releases For Order Screen, Return Releases

Release #	The release number. Click this link to view the Return Release Details screen.
Return To Node	The node handling the return. Click this link to view the ship node details. For more information about this screen, see the *Sterling Distributed Order Management: User Guide*.
Status	The current status of the return release. Click this link to view the Return Release Status Breakup screen.

8.9 Work Orders

You can view the work orders related to the return through the return details screen. Return service work orders only apply to delivery services and value-added services. From the Return action bar, click 🖼. The Work Orders screen appears.

> **Note:** When creating a synchronized work order for return and exchange, the header level work order icon only appears in the line level panels.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–16   Work Orders Screen, Service Work Orders

Actions	
View Details	This action takes you to the Work Order Details screen where you can view the work orders associated with this return.

Table 8–16   Work Orders Screen, Service Work Orders

Fields	
Work Order #	The work order number. Click this link to view the work order details. Click the Expand All button, details for each work order are expanded. If you click the Collapse All button, details for each work order are collapsed.
	This inner panel is only displayed if service work orders are associated with the return.
Service Lines	The return work orders do not contain associated Provided Services. Hence the service lines are just delivery lines.

Order Line Related Info	The information related to the service item. Displayed values are item ID and item description.
Item Group Code	The group code of the item. For delivery services the item group code is `Delivery Service`.
Required Quantity	The quantity of the service items required.

Products being Delivered	

Item Related Info	The information related to the product item. Displayed values are item ID and item description.
PC	The product item's product class.
UOM	The product item's unit of measure.
Required Quantity	The quantity of the product item on the work order.
Delivered Quantity	The quantity of the delivery item on the work order.

Ship Node	The node from which the resource is originating.

Table 8–16   Work Orders Screen, Service Work Orders

Status	The status of the work order.
Appointment	If applicable, the date and time of appointments taken for that work order.
Pre-call Status	The status of the pre-call, if applicable.

The value-added services inner panel provides information on the WMS work orders that are associated with this return. Please note that this inner panel is only displayed if value-added service work orders are associated with this return.

Table 8–17   Work Orders Screen, Value-Added Services

Action	
View Details	This action takes you to the value-added services work order details screen. For more information about viewing this screen, see the *Sterling Warehouse Management System: User Guide*.
Fields	
Work Order #	The work order number associated with the return. Click this link to view the work order details.
Ship Node	The node from which the resource is originating.
Service Item Group	The service item group associated with the work order.
Priority	The work order priority.
Segment Type	Segment type of the item. A segment type indicates an inventory category. Typical values are MTC - Made To Customer or MTO - Made to Order.
Segment #	Segment number of the item. A segment holds either the specific buyer or specific order number that requires dedication.
Status	The work order status.

8.10 Return Invoices

You can view the invoices that have been created from the return for payment collection purposes.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–18   Return Invoices Screen, Invoices

Action	
View Details	This action takes you to the Invoice Details screen where you can view the invoice summary details.
Fields	
Invoice #	The invoice number for this return. Click this link to view the Invoice Details screen.
Invoice Type	The type of invoice created. For example, Credit Memo is a type of an invoice.
Total Amount	The total amount for which the invoice was recorded.
Amount Collected	The amount of invoice collected.

8.11 Invoice Details

The invoice details for a return order can be viewed in this screen.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–19   Invoices

Fields	
Return #	The return with which the invoice is associated. Click this link to view the Return Detail screen.
Collected Through AR?	Indicates if the payment was collected through accounts receivable.
Currency	The currency used on the invoice.
Invoice #	The invoice number.

Table 8–19   Invoices

Fields	
Invoice Type	The type of invoice. For example, shipping invoice, debit invoice, or credit invoice.
Reference	This field can be customized as needed.

Table 8–20   Invoice Details Screen, BillTo

View Icon	
🖳	**Address Details** - Choose this icon to view or modify the BillTo addresses.For more information about the screen that is displayed, refer to Organization Address Details Screen screen.
The name and address of the person or organization being debited.	

The summary panel is tabulated for the return header and return line invoices. The field descriptions for each of these is as follows:

Table 8–21   Invoice Details Screen, Summary

Fields	
Price	The price at the return header and return line levels before any discounts, charges, or taxes have been applied to it.
Fees	Any fees at the return header and return line levels.
	Note: At the header level, this charge is applied when the final shipment has been received, in case of multiple shipments.
	At the line level, this charge is applied to the first shipment received, in the case of multiple shipments.
Charges	Any additional charges at the return header and return line levels.
Taxes	Any additional taxes at the return header and return line levels.
Totals	The total invoice amount at the return header and return line levels after fees, charges, or taxes have been applied to the original price.

Table 8–22   Invoice Details Screen, Balance

Field	Description
Invoiced	The total amount of the invoice.
Collected	The amount that has currently been paid towards the invoice. Click this link to view the Collection Details screen.
Amount Collected Through AR	The amount paid towards the invoice through accounts receivable, if applicable.
Balance	The amount remaining to be collected.

8.12 Return Shipments

You can view the shipments that have been made against a return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–23   Return Shipments Screen, Shipments

Action	
View Details	This action takes you to the Return Shipment Details screen where you can view the details of the shipments and containers.
Fields	
Shipment #	The shipment number associated with the return, if applicable. Click this link to view the Return Shipment Details screen.
Shipper's Ref. #	The shipment reference number associated with the return.
Expected Ship Date	The date the shipment is expected to ship.
Ship Mode	The shipping mode.
Return To Node	The return to node of the shipment.
Recv Node	The receiving node of the return shipment.
Status	The shipment status.

> **Note:** For history returns, all actions on the Return Shipments screen are presented if the shipments are requested for a history shipment. All actions are allowed if the shipments are from the regular shipment table.

8.13 Return Instructions

You can view information related to the personalization of an return order, such as the attachment of a gift message or the style of wrapping paper to be used when packing an item.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–24   Instructions

Action	
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the icon.

You can also use the Instructions window for:

- **Adding an Instruction** - You can add instructions that add a customer's notes to each return. Instructions are created to inform the individual responsible for packing the return of the Buyer's special requests. Select the icon to add the instruction lines and enter the relevant information in the fields as discussed in the Instructions table.

- **Modify an Instruction** - The information in the Return Instructions screen can be modified by entering the modified information and selecting `Save`.

8.14 Additional Order Addresses

You can view any additional addresses as needed by your business. For more information about defining additional address types, see the *Sterling Reverse Logistics: Configuration Guide*.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–25   ForwardTo

View Icon	
	Address Details - Choose this icon to view or modify the ForwardTo addresses. For more information about the screen that is displayed, see Organization Address Details Screen.
The name and address of the person or organization where the return is to be forwarded.	

8.15 Return Audits

You can view audits logged against a return. An audit is logged against a return when any type of modification is made to the return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–26   Return Audits Screen, Audits

Action	
View Details	This action takes you to the Return Audit Details screen for the selected audits.
Fields	
Order Created in Sterling	The date and time the order was created.

Table 8–26   Return Audits Screen, Audits

Audit #	The audit identification number. Click on the Expand All button, the audit details for each audit are expanded. If you click on the Collapse All button, the audit details for each audit are collapsed.		
		Detail #	The audit details identification number. Click this link to go to the Return Audit Details screen.
		Order Line Related Info	Any information related to order lines impacted by the modification, including: • Item ID - the item associated with the audit. • Item Description - a brief description of the item. • Line Number - the line number associated with the audit. Click this link to view the Return Line Detail screen.
		Modification Level	The level of modification for the corresponding audit detail such as header or line.
		Modification Type	The type of modification, such as change payment status or change carrier, for the corresponding audit detail.
Date	The date and time the modification was carried out.		
Modified By	The user that performed the modification.		
Reason	The reason the modification occurred and any additional information explaining the modification entered by the user.		
Modification Levels	A comma separated list of all levels of modification for the audit.		
Modification Types	A list of the types of modifications for the audit. There is a maximum of three items shown with an ellipsis on the third line if there are more items.		

8.16 Return Audit Details

You can view more details of a return's audit in this screen.

Table 8–27   Return Audit Details Screen, Return Audit

Fields	
Return #	The return number the modification was performed on.
Enterprise Code	The Enterprise that owns the return.
Modification Level	The level the return was modified at. For example, return or return LINE.
Modification Type	The type of modification performed on the return.
Reason Code	The reason code detailing why the modification was performed.
Reason Text	Additional details about why the modification was performed.
Reference #1	Reference information about the return audit.
Reference #2	Reference information about the return audit.
Reference #3	Reference information about the return audit.
Reference #4	Reference information about the return audit.

Table 8–28   Return Audit Details Screen, Return Audit Details

Fields	
Audit Type	The type of audit performed.
Identifier	The audit identifier.
Name	The attribute that was modified.
Old Value	The value of the modified attribute prior to modification.
New Value	The value of the modified attribute after modification.

8.17 Notes

You can add notes to an return by selecting the 📝 icon in the return header panel of Return Detail screen.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–29   Notes Screen, Notes

Fields	
Contact Time	The time at which this note was added to the work order. This is defaulted to the creation time of the Notes pop-up window.
Contact User	The user who created this note. This is defaulted to the logged on user.
Reason Code	The reason code for this note.
Contact Type	The type of contact information on this note, for example phone or e-mail.
Contact Reference	The contact information on this note. For example, if contact type is phone, the contact's phone number can be entered here. If contact type is e-mail, the contact's e-mail address can be entered.
Add Note	The note for this work order.

Enter the relevant information and click Save to create the note.

8.18 Return Payment Information

You can view the payment information related to an return, including the methods of payment, charge sequence, and collection amounts.

Payment transactions can be in any one of the following states:

- Awaiting Payment Information - Selling and Fulfillment Foundation is waiting for a third-party payment processing application to receive the Buyer's payment information before the return can be authorized.

- Invoiced - An invoice has been created and distributed to the necessary parties.

- Failed Charge - A problem occurred when payment collection was attempted and manual intervention is required.

- Hold - For some reason the return must be put on hold until a payment issue is resolved.

- Paid - The settlement has been received and the return can be closed.

- Not Applicable - Payment status is not applicable. For example, if the return is a draft return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–30   Return Payment Information Screen, Payment Information

Actions	
Add Payment Type	This action takes you to the Add Order Payment Information screen.
Create Credit Memo	This action takes you to the Create Credit Memo screen where you can create credit memos for the payment types.
Create Debit Memo	This action takes you to the Create Debit Memo screen where you can create debit memos for the payment types.
View Collection Details	This action lets you view the Collection Details screen where you can

Table 8–30   Return Payment Information Screen, Payment Information

Fields	
Payment Rule	The payment rule used for invoicing, settlement, and collection. For more information about payment rules, see the *Sterling Distributed Order Management: Configuration Guide.*
Total Adjustments	The total adjustments made to the amount after credits and debits have been taken into consideration.
Total Collected	The total amount of the return that has been collected.
Open Authorized	The amount that has been authorized.
Total Refunded	The total amount of the return that has been refunded.
Total Cancelled	The total amount of the return that has been cancelled as a result of cancelling the return lines.
Funds From Return	The total funds that can potentially be transferred from the return that originated the exchange. The funds from the return are broken down as follows: • Total Transferred: The total of the funds that have been transferred from the return. • Pending Transfer: The total of the funds that have not yet been transferred from the return. **Note:** This field is only displayed for exchange orders.

The payment information can have the following fields if a payment type has been defined.

If the payment type displayed is in the credit card payment type group the following fields are defined:

Table 8–31   Return Payment Information Screen, Credit Card

View Icons	
	Address Details - This icon takes you to the Address Details screen where you can view the Bill To address on this credit card. This action is only available when you have specified an override bill to address for this credit card.

Table 8–31   Return Payment Information Screen, Credit Card

Actions	
Charge	This action lets you charge the payment amount in the Charge screen.
Delete	This action deletes the payment information belonging to a certain payment type. An alert window pops up confirming the deletion of the payment type. Click OK and the payment type is deleted.
Fields	
Payment Type	The payment type. For example, Credit Card.
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against. **Note:** The charge sequence configured for this payment type overrides any value entered in this field. However, if two configured charge sequences have the same sequence number, the value entered in this field is used as a tie breaker.
Collected Amount	The amount of the return that has been collected against this payment type.
Refunded Amount	The amount of the return that has been refunded against this payment type.
Credit Card #	The credit card number. **Note:** If encryption is turned on, credit card numbers are displayed with asterisks (*) for the first 12 digits, unless you have permissions to view decrypted primary payment attributes.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Authorized Amount	The amount that has been authorized to collect with this payment type.
Expiration Date	The expiration date on the credit card. This field may be encrypted.

Table 8–31   Return Payment Information Screen, Credit Card

Max Charge Limit	The maximum amount this payment type can be charged.
Awaiting Collections	The amount waiting to be collected against this payment type.
Credit Card Type	The type of credit card, such as VISA or MasterCard.
Awaiting Authorizations	The amount waiting to be authorized.
Name On Card	The name exactly as it appears on the card. **Note:** The field can be encrypted, if the user does not have permission to view the name.
Payment Type Status	This field provides the current status of the payment type. <table><tr><td>Suspended for Charge</td><td>If selected, payment collections are frozen, but refunds can still be performed for the specified payment type. Reactivate payment collections by choosing Active.</td></tr><tr><td>Suspended for Charge and Refund</td><td>If selected, payment collections and refund credits are frozen for the specified payment type. Reactivate payment collections and refunds by choosing Active.</td></tr><tr><td>Active</td><td>If selected, payments can be collected and credits can be refunded for the specified payment type.</td></tr></table>

The actions and the payment type status are the same in all the panels. However the primary information for each payment type differs.

Table 8–32   Return Payment Information Screen, Customer Account

Actions	
For the list of actions refer to the Return Payment Information Screen, Credit Card table.	
Fields	
Payment Type	The payment type. For example, Credit Card or Check.
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type.
	For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
	Note: The charge sequence configured for this payment type overrides any value entered in this field. However, if two configured charge sequences have the same sequence number, the value entered in this field is used as a tie breaker.
Collected Amount	The amount of the return that has been collected against this payment type.
Refunded Amount	The amount of the return that has been refunded against this payment type.
Customer Account #	The Buyer's account number.
	If encryption is turned on, this field displays only the last four digits of the customer account number, unless you have the necessary permissions.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Authorized Amount	The amount that has been authorized to collect with this payment type.
Customer PO #	The purchase order number placed for the return.
Max Charge Limit	The maximum amount this payment type can be charged.
Awaiting Collections	The amount waiting to be collected against this payment type.

Table 8–32   Return Payment Information Screen, Customer Account

Payment Reference #1	This field can be customized as needed.
	If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.
Payment Reference #2	This field can be customized as needed.
Awaiting Authorizations	The amount waiting to be authorized.
Payment Type Status	Refer to the Return Payment Information Screen, Credit Card table for the payment type status details.

Table 8–33   Return Payment Information Screen, Stored Value Card

Actions	
For the list of actions refer to the Return Payment Information Screen, Credit Card table.	
Fields	
Payment Type	The payment type, for example, gift card.
Stored Value Card #	The stored value card number.
	Note: If encryption is turned on, SVC numbers displayed with asterisks (*) for all but the last four digits, unless you have permissions to view decrypted primary payment attributes.
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type.
	For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
	Note: The charge sequence configured for this payment type overrides any value entered in this field. However, if two configured charge sequences have the same sequence number, the value entered in this field is used as a tie breaker.
Collected Amount	The amount of the return that has been collected against this payment type.

Table 8–33   Return Payment Information Screen, Stored Value Card

Refunded Amount	The amount of the return that has been refunded against this payment type.
Payment Reference #1	This field can be customized as needed.
	If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
	This field does not displayed if the ChargeUpToAvailable flag has been enabled in the Applications Manager.
Authorized Amount	The amount that has been authorized to collect with this payment type.
Payment Reference #2	This field can be customized as needed.
Max Charge Limit	The maximum amount this payment type can be charged.
Awaiting Collections	The amount waiting to be collected against this payment type.
Payment Reference #3	This field can be customized as needed.
Awaiting Authorizations	The amount waiting to be authorized.
Funds Available	Amount of funds available on this card. This field displays 'Not Applicable' if the query to get available funds has been disabled.
Payment Type Status	Refer to the Return Payment Information Screen, Credit Card table for the payment type status details.

Table 8–34   Return Payment Information Screen, Other

Actions	
For the list of actions refer to the Return Payment Information Screen, Credit Card table.	
Fields	
Payment Type	The payment type. For example, Check.

Table 8–34   Return Payment Information Screen, Other

Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type.
	For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
	Note: The charge sequence configured for this payment type overrides any value entered in this field. However, if two configured charge sequences have the same sequence number, the value entered in this field is used as a tie breaker.
Collected Amount	The amount of the return that has been collected against this payment type.
Payment Reference #1	This field can be customized as needed.
	If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Authorized Amount	The amount that has been authorized to collect with this payment type.
Payment Reference #2	This field can be customized as needed.
Max Charge Limit	The maximum amount this payment type can be charged.
Awaiting Collections	The amount waiting to be collected against this payment type.
Payment Reference #3	This field can be customized as needed.
Awaiting Authorizations	The amount waiting to be authorized.
Payment Type Status	Refer to the Return Payment Information Screen, Credit Card table for the payment type status details.

8.19 Add Order Payment Information

You can add one or more payment types to collect against an return.

If the payment type selected is in the credit card payment type group, the following fields are displayed:

Table 8–35   Add Order Payment Information Screen, Credit Card Payment Type

Fields	
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Credit Card #	Enter the credit card number.
Unlimited Charges	Select the Unlimited Charges if the payment type has no charge limit.
Expiration Date	Enter the expiration date on the credit card.
Max Charge Limit	Enter the maximum amount that can be collected against this payment type.
Credit Card Type	Enter the type of credit card, such as VISA or MasterCard.
Name On Card	Enter the name exactly as it appears on the card.
Override Bill To Address	Check this box to override the bill to address on the order. For more information about address details, refer to Table 8–159.

If the payment type belongs to customer account payment type group, the following fields are displayed.

Table 8−36   Add Order Payment Information Screen, Customer Account Payment Type

Fields	
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type.
	For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Customer Account #	The Buyer's account number.
	If encryption is turned on, this field displays only the last four digits of the customer account number, unless you have the necessary permissions.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Customer PO #	The purchase order number placed for the return.
Max Charge Limit	Enter the maximum amount that can be charged against this payment type.
Payment Reference #1	This field can be customized as needed.
Payment Reference #2	This field can be customized as needed.

If the payment type is check or others then both payments fall under the Others payment type group. The field descriptions of both payment types are same.

Table 8−37   Add Order Payment Information Screen, Check or Other Payment Type

Fields	
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type.
	For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Payment Reference #1	This field can be customized as needed.

Table 8–37   Add Order Payment Information Screen, Check or Other Payment Type

Fields	
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Payment Reference #2	This field can be customized as needed.
Max Charge Limit	Enter the maximum amount that can be collected against this payment type.
Payment Reference #3	This field can be customized as needed.

If the payment type selected is in the Stored Value Card (SVC) payment type group, then the following fields are available:

Table 8–38   Add Order Payment Information Screen, Stores Value Card Payment Type

Fields	
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type.
	For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
	This field is not displayed if the ChargeUpToAvailable flag has been enabled in the Applications Manager.
Payment Reference #1	This field can be customized as needed.
Max Charge Limit	Enter the maximum amount that can be collected against this payment type.
Payment Reference #2	This field can be customized as needed.
Payment Reference #3	This field Can be customized as needed.

Click Save after entering the necessary information for adding a payment types. The Return Payment Information screen is populated with the added payment types.

8.20 Create Credit Memo

You can create a credit memo to add additional credit charges to an return.

Table 8–39   Create Credit Memo Screen, Credit Memo Details

Fields	
Amount	Enter the amount for which you wish to create the credit memo.
Reference	Enter the reference number.

8.21 Create Debit Memo

You can create a debit memo to add additional credit charges to an return.

Table 8–40   Create Debit Memo Screen, Debit Memo Details

Fields	
Amount	Enter the amount for which you wish to create the debit memo.
Reference	Enter the reference number.

8.22 Collection Details

You can view collection details associated with an return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–41   Collection Details Screen, Collection Details

Fields	
Total Collected	The amount of credit collected.
Total Invoiced	The amount the Buyer account has been debited or charged.
Total Refunded	The amount that has been refunded on the return.
Return Invoiced Amount	The amount that has been invoiced for a return charge for an return.

Table 8–41   Collection Details Screen, Collection Details

Fields	
Total Cancelled	The amount for which cancellation has been done on return lines on an return.
Funds From Return	The total funds that can potentially be transferred from the return that originated the exchange.
	The funds from the return are broken down as follows:
	• Total Transferred: The total of the funds that have been transferred from the return.
	• Pending Transfer: The total of the funds that have not yet been transferred from the return.
	Note: This field is only displayed for exchange orders.

Table 8–42   Collection Details Screen, Invoice Collection Information

Fields	
Invoice #	The invoice number.
Invoice Date	The date and time that the invoice was created.
Amount Collected	The amount that has currently been paid towards the invoice.
Total Invoice Amount	The total amount of the invoice.

There are two views in this screen. One is the Charge and Authorization Summary View and the other is the Advanced Collection Details. Use the drop-down menu to select either one of the option. In the Charge view only the transaction types CHARGE related details would be available. If you want to view the adjustments due to refunds, change of prices, choose the Advanced Collection Detail view.

If you click on the Expand All button, the charge transaction details for each charge transaction are expanded. If you click on the Collapse All button, the charge transaction details for each charge transaction are collapsed.

The following Collection Summary panel provides field descriptions for both the views.

Table 8–43   Collection Details Screen, Collection Summary

Fields	
Date	The date that authorization/charging or adjustments was carried out.
Transaction Type	The transaction type for which the payment authorization or charge was carried out.
	When you expand the transaction types the following payment information can be viewed:
	• Customer Account Information Expanded
	• Credit Card Information Expanded
	• Stored Value Card Information Expanded
	• Payment Type Information Expanded
	The transaction type in the case of advanced collection details are: Adjustments, Change Price etc.,
Open Order	The remaining amount to be collected on the return.
Authorized	The amount that has been authorized.
Pre Settled Amount	The amount that has been pre-settled.
Invoiced	The amount that is owed by the Buyer to the Enterprise.
Collected	The amount collected on the transaction.
Pending Execution	The amount that is pending authorization.
Status	Indicates if the collection is still OPEN, CHECKED or CLOSED.

Table 8–44   Customer Account Information Expanded

Fields	
Payment Type	The payment type.
Customer Account #	The customer account #.
	If encryption is turned on, this field displays only the last four digits of the customer account number, unless you have the necessary permissions.
Customer PO #	The purchase order number placed for the return.

Table 8–44   Customer Account Information Expanded

Fields	
Payment Reference #1	This field can be customized as needed.
	If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.
Payment Reference #2	This field can be customized as needed.
Authorization ID	The authorization ID necessary to begin authorization of the credit card.
Authorization Expiration Date	The date the payment must be collected by before the amount has to be manually authorized again.
Pending Execution Amount	The amount that is pending authorization.
Authorization Code	The authorization code.
Authorization AVS	AVS Authorization code.
Authorization Message	Authorization message.

Table 8–45   Credit Card Information Expanded

Fields	
Payment Type	The payment type i.e. credit card.
Credit Card #	The credit card number. If encryption is turned on, this field only displays the last four digits of the credit card number if you do not have the necessary permissions.
Expiration Date	The expiration date on the credit card.
Credit Card Type	The type of credit card, such as VISA or MasterCard.
Name on Card	The name exactly as it appears on the card.
	Note: The field can be encrypted, if the user does not have permission to view the name.
Authorization ID	The authorization ID necessary to begin authorization of the credit card.
Authorization Expiration Date	The date the payment must be collected by before the amount has to be manually authorized again.
Pending Execution Amount	The amount that is pending authorization.

Table 8–45   Credit Card Information Expanded

Fields	
Authorization Code	The authorization code.
Authorization AVS	AVS Authorization code.
Authorization Message	Authorization message.
CVV Authorization Code	CVV Authorization code.

Table 8–46   Stored Value Card Information Expanded

Fields	
Payment Type	The payment type i.e. gift card.
Stored Value Card #	The stored value card number. If encryption is turned on, this field only displays the last four digits of the stored value card number if you do not have the necessary permissions.
Payment Reference #1	This field can be customized as needed. If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.
Payment Reference #2	This field can be customized as needed.
Payment Reference #3	This field can be customized as needed.
Authorization ID	The authorization ID necessary to begin authorization of the credit card.
Authorization Expiration Date	The date the payment must be collected by before the amount has to be manually authorized again.
Pending Execution Amount	The amount that is pending authorization.
Authorization Code	The authorization code.
Authorization AVS	AVS Authorization code.
Authorization Message	Authorization message.

Table 8–47 Payment Type Information Expanded

Fields	
Payment Type	The payment type i.e. check.
Payment Reference #1	This field can be customized as needed.
	If encryption is turned on, this field displays only the last four digits of the Payment Reference number, unless you have the necessary permissions.
Payment Reference #2	This field can be customized as needed.
Payment Reference #3	This field can be customized as needed.
Authorization ID	The authorization ID necessary to begin authorization of the credit card.
Authorization Expiration Date	The date the payment must be collected by before the amount has to be manually authorized again.
Pending Execution Amount	The amount that is pending authorization.
Authorization Code	The authorization code.
Authorization AVS	AVS Authorization code.
Authorization Message	Authorization message.

8.23 Charge

You can manually enter an amount to be charged with a particular payment type.

Table 8–48 Charge

Fields	
Authorization ID	Enter the authorization ID for the charge.
Code	Enter a code for the charge.
Expiration Date	Enter the expiration date for the charge.
Amount	Enter the amount being charged.

8.24 Related Orders

If the return was created off of an order, you can view the original order it was derived from.

A derived order is associated with a parent order yet the lifecycle of one order does not necessarily impact the lifecycle of the other order. A return order derived from a sales order and an exchange order derived from a return order are both examples of derived orders.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–49   Related Orders Screen, Sales Order Lines

Action	
View Details	This action takes you to the Order Details screen where you can perform actions on the order. For more information about this screen, see the *Sterling Distributed Order Management: User Guide*.
Fields	
Order #	The sales order number related to this return. Click this link to view the order details.
Relationship	The relationship of the sales order with this return.
Status	The status of the sales order. Click this link to view the Order Status Breakup screen. For more information about this screen, see the *Sterling Distributed Order Management: User Guide*.
Buyer	The buyer organization of this order.
Seller	The seller organization of this order.

If there is any exchange order for this return the following fields are displayed.

Table 8–50   Related Orders Screen, Exchange Order For This Return

Fields	
Order #	The sales order number related to this return. Click this link to view the order details. For more information about this screen, see the *Sterling Distributed Order Management: User Guide*.
Exchange Type	The type of the exchange. For example, `Regular` is a valid exchange type.
Status	The status of the exchange order.
Enterprise	The enterprise organization of this exchange order.
Buyer	The buyer organization of this exchange order.
Seller	The seller organization of this exchange order.
Funds From Return	The total funds that can potentially be transferred from the return that originated the exchange. The funds from the return are broken down as follows: • Total Transferred: The total of the funds that have been transferred from the return. • Pending Transfer: The total of the funds that have not yet been transferred from the return.
Line #	The line number in the exchange order.
Date	The date the order line was added.
Item ID Description	The item ID and its description associated with the exchange order.
Product class	The product class of the item.
UOM	The unit of measure for the item.
Quantity	The quantity of the item ordered.
Amount	The amount of the order.
Status	The status of the exchange order.

8.25 Return Dates

You can view any custom dates that have been configured for monitoring. For more information about monitoring, see the *Sterling Reverse Logistics: Configuration Guide.*

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–51   New Dates

Fields	Description
Date Type	The custom date type.
Requested	The date on which the date type is requested to be met.
Expected	The date on which the date type is expected to be met.
Actual	The date on which the date type actually needs to be met.

8.26 Authorize Return

If the return node has been configured as requiring authorization, you can use the Authorize action to authorize the return. When a return is authorized it moves from the awaiting authorization status to the next applicable status in the Application Console.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–52   Authorize Return Screen, Comments

Fields	
Contact Time	The most recent date and time the customer was contacted.
Contact Type	The type of contact. For example, Email contact.
Contact User	The user who contacted the customer.
Contact Reference	The reference number for the contact.
Reason Code	The contact reason code.

Table 8–52   Authorize Return Screen, Comments

Fields	
Add Note	Enter any notes as needed concerning the authorization of the return.
Date	Automatically records the date the note was entered.
User	Automatically records login ID of the user that entered the note.
Contact Type	The type of contact. For example, Email contact.
Contact Reference	The reference number for the contact.
Transaction Name	Automatically records the transaction performed when the note was entered.
Notes	Stores any previous notes entered by users.

Table 8–53   Authorize Return Screen, Authorization Details

Fields	
Authorize Drop Status	Select `Authorized` to authorize a return.
	Select `Not Authorized` to keep the return in the `Awaiting Authorization` status. If any alerts have been configured upon non-authorization of a return, they are sent out.
Line	The return line number being authorized. Click this link to view the Return Line Detail screen.
Item ID	The item ID of the return item being authorized.
PC	The return item's product class.
UOM	The return item's unit of measure.
Return To Node	The node handling the return line.
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the inventory batch number the return line belongs to, click the hypertext link.
Quantity	The quantity of the item being returned in the return line.

8.27 Associate Service Request

On this screen, you can view the service requests that can be associated with the order line.

Table 8–54   Associate Service Request Screen, Return Line

Fields	
Return #	The return number.
Line #	The line number of the product item on the order.
Line Quantity	The line quantity of the product item.
Item ID	The item identifier of the product item.
Unit Of Measure	The unit of measure of the product item.
Product Class	The product class of the product item.
Description	The description of the product item.
Status	The current status of the return line.
Receiving Node	The node that is receiving the product.
Return To Node	The node that is handling the return.
Requested Ship Date	The date on which the product item is requested to be shipped.
Options	The Options table displays only when a service request has optional services such as clean up or old appliance removal. <table><tr><td>Option Checkbox</td><td>Choose the checkbox of the services you want to enable.</td></tr><tr><td>Option ID</td><td>Displays the identifier of the service request option.</td></tr><tr><td>Description</td><td>Displays the short description of the service request option.</td></tr><tr><td>Price</td><td>Displays the price of the service request option.</td></tr></table>

Table 8–55   Associate Service Request Screen, Service Requests

Fields	
Item ID	The unique identifier of the service.
UOM	The unit of measure of the service.
Item Description	The description of the service.
Price	The price of the service.

8.28 Associated Service Requests

You can view the service items that are associated with a product item in this screen.

For more information about the return line header field level descriptions, see Table 8–54.

Table 8–56   Associated Service Requests Screen, Return Line

View Icon	
	Add Service Requests - This icon takes you to the Associate Service Request screen where you can add the required service requests associated with the product line.

Table 8–57   Associated Service Requests Screen, Service Requests

Action	
Cancel	This action enables you to cancel the selected service requests. In the Modification Reason screen that pops up, enter the reason code and reason text for cancelling the service request.
Fields	
Line	The line of the service. Click this link to view the Service Request Details screen.
Item ID	The unique identifier of the service.
Item Description	The description of the service.
Appointment	The date and time of the service.
Service Offset (Hrs)	The number of hours the service is offset by.

Table 8–57   Associated Service Requests Screen, Service Requests

Amount	The amount of the service.
Status	The current status of the service.

8.29 Associate Pickup Request

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–58   Associate Pickup Request Screen, Pickup Request

Fields	
Return To Node	The node handling the return.
Ship To Address	The ship-to address on the return.
Receiving Node	The node receiving the product.
Line	The product item's line number on the order.
Item ID	The product item's ID.
PC	The product item's product class.
UOM	The unit of measure for the product item.
Description	Displays the description of the product item.
Options Table	The Options table displays only when a pickup request has any optional services available, such as clean up or old appliance removal. <table><tr><td>Option Checkbox</td><td>Choose the checkbox of the services that you want to enable.</td></tr><tr><td>Option ID</td><td>Displays the ID of the pickup request option.</td></tr><tr><td>Description</td><td>Displays the short description of thepickup request option.</td></tr><tr><td>Price</td><td>Displays the price of the pickup request option.</td></tr></table>

8.30 Add Pickup Request

Items that cannot be transported by common carriers (for example, heavy, oversized, or fragile items) can be associated with a pickup service through the Applications Manager. Piano pickup is an example of a pickup service.

Typically, in the Application Console, items that need an associated pickup service are indicated by a 🏠 icon.

> **Note:** Pickup lines cannot be split. However, you can split a product line that has associated pickup service, which results in the following recalculations:
>
> - Pickup line quantity
> - Pricing
> - Capacity requirements for the pickup line

When you create pickup requests, you are associating pickup items (intangible services) with product items (tangible items).

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

One table appears for each set of items that have the same Ship Node, Receiving Node, and Ship To Address.

Table 8–59   Add Pickup Request Screen, Pickup Request

Fields	
Item ID	The pickup request's ID.
UOM	The unit of measure for the pickup request.
Description	Displays the description of the pickup request.

8.31 Order Entry

Exchange orders are created to replace product items that are being returned through a return order. For that reason, an exchange order can be only be created from an existing return order.

To create an exchange order from the Return Detail action bar, click Create Derived Return Order. The Order Entry screen appears.

Table 8–60   Order Entry

Fields	
Document Type	Select the type of order document you are creating. For example, Sales Order or Transfer Order.
Enterprise	Select the Enterprise that is to handle the order.
Buyer	Enter the Buyer placing the order.
Seller	Enter the Seller that the order is being placed from.
Order #	Enter the order number.
Type	This field can be customized as needed.
Date	Enter the date the is placed.
Order Name	The name of the exchange order.
Currency	Select the currency with which any are to be handled in.
Exchange Type	Select the type of the exchange order from the drop-down list.

After entering the necessary information click Create Order and you are taken to the order detail screen.

8.32 View Holds

Returns can be placed on hold, preventing them from being processed by certain transactions, and preventing certain modification types from being applied. Using the Applications Manager, you can configure which transactions and modification types are disallowed for a return on a particular hold type. Additionally, hold types can be configured to be applied automatically. For instance on return creation or upon resolution of another hold. For more information about defining and configuring hold types, see the *Sterling Distributed Order Management: User Guide*.

The order header field descriptions can be referred from the Return table.

Table 8–61   View Holds Screen, Order Holds

View Icons	
View History	This icon takes you to the View History screen, where you can view the hold's history.
Action	
Add Holds	This action takes you to the Add Holds screen, where you can add holds to a return.
Fields	
Hold Type	The description of the hold.
Hold Status	The status of the hold. Holds can either be in created, resolved, or rejected status.
Hold Comment	The reason for applying this hold to the return, or changing the status of the hold.
Action	Select from the drop-down list the status to which you want to move this hold.
Reason	Enter the reason for changing the status of this hold.

Table 8–62   View Holds Screen, Resolved Holds

View Icons	
View History	This icon takes you to the View History screen, where you can view the hold's history.
Fields	
Hold Type	The description of the hold.
Reason	The reason for changing this hold to resolved status.

Click Save to update the changes made in the screen, and close it.

8.33 Add Holds

You can add a hold to a return, if that hold is not already being applied to the return in `created` or `rejected` status. If you add a hold that was previously applied and now in `resolved` status, it removes that hold from the list of approved holds, and reset its status to `created`. That hold

remains its previous history records for that order, and further status modifications are added on to that history.

Table 8–63   Add Holds Screen, Order Holds

Fields	
Hold Type	Select the hold type you want to apply to the return from the drop-down list.
Reason	Enter the reason for adding this hold to the return.

Click Save to close this screen and apply the selected hold to the return.

8.34 View History

Every time the status of an order hold changes, useful information regarding the status change is recorded in Selling and Fulfillment Foundation. You can view, in this screen, the history of an order hold.

The order header field descriptions can be referred from the Return table.

Table 8–64   View History Screen, Order Holds

Fields	
Hold Type	The hold type for which the history is being displayed.
Date/Time	The date and time when the hold's status changed.
User ID	The user who performed the change on the hold.
Status	The status that the hold was moved to.
Comment	The reason for the hold's creation or status change, if applicable.
Hold Transaction	The transaction responsible for the hold's status change.

8.35 Work Order Entry Screen

You can create a work order if an order line has an associated Delivery Service.

The return work orders do not contain provided services.

Table 8–65   Work Order Entry Screen, Header Details

Fields	
Enterprise	The name of the enterprise that owns the work order.
Work Order #	Enter the work order number.
Ship Node	If the work order contains a provided service, this designates the ship node from which the resource is originating. If the work order contains a delivery service and no provided service, this designates the ship node from which the product is being delivered.
Multiple Appointments	Check this if you are using multiple appointments for this work order.

Table 8–66   Work Order Entry Screen, Delivery Services

Fields	
Line	The order line number.
Item ID	The ID of the delivery service item.
Description	The description of the delivery service item.
Ship Node	The node from which the product is being delivered.
Line Qty	The quantity of work (distance, time, or an arbitrary unit) required to deliver the product.

Table 8–67   Work Order Entry Screen, Products Being Delivered

Fields	
Line	The order line number.
Item ID	The ID of the product being delivered.
PC	The product class of the product being delivered.
UOM	The unit of measure of the product being delivered.
Description	The description of the product being delivered.
Ship Node	The ship node that the product is being delivered from.
Required Quantity	The quantity of the product being delivered.

Once you enter the details and click `Create Work Order` you are taken to the Work Order Details screen to plan appointments, check resource availability to perform the tasks.

8.36 Return Status Breakup

The status breakup enables you to view the status of a return. A return can be in multiple statuses at the same time. For example, one return line can be in Created status while another return line is in the Released status.

To view a return's status breakup in the Return Detail screen, choose the Status link. The Return Status Breakup window appears.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–68   Return Status Breakup Screen, Return Lines by Status

Field	Description
Line	The return line number. Click this link to view the Return Line Status Breakup details.
Item ID	The item ID.
PC	The item classification such as first quality, second quality, or finished good.
UOM	The line item's unit of measure.
Return To Node	The node handling the return.
Last Changed On	The date the line last had a status change.
Status	The current status for that part of the return line.
Quantity	The quantity of the line item returned. This field can be modified.
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the return line, click the hypertext link.

8.37 Return Refund Summary

You can view any charges, taxes, and discounts that have been applied to the base amount of an return at both the header and line level.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Table 8–69   Return Refund Summary Screen, Summary

Fields	
Summary	The summary panel provides the price, discount, charges and taxes for an return and the return line.
	You can view all of the charges that exist against a return by selecting Overall.
	You can view only the charges that are still open against the return by selecting Open.
	You can view only the charges that have been invoiced for the return by selecting Invoiced.
	Important: If you have selected the Overall view, be aware that the amounts displayed are subject to change due to cancellations, over-shipments, over-receipts, and so on.
Price	The price at the header and line levels before any discounts, charges, or taxes have been applied to it.
Total Charges	Any additional charges at the header and line levels. Click the link under the `Header` level row to view the return charges and select the link under `Line` level to view the line charges. This link takes you to different screens based on the type of summary selected.
Taxes	Any additional taxes at the header and line levels. Click the link under the `Header` level row to view the return taxes and select the link under `Line` level to view the line taxes. This link takes you to different screens based on the type of summary selected.
Totals	The total of Price, Discount, Charges, and Taxes at the header and line levels.

A line summary inner panel displays prices on a line level. If there are any pickup request charges, a pickup request summary inner panel also displays with details regarding any price-related information regarding pickup requests.

Table 8–70   Return Refund Summary Screen, Line Summary

Fields	
Line #	The line number. Click this link to view the Return Line Detail screen.
Item ID	The item ID.
PC	The item classification such as first quality, second quality, or finished good.
UOM	The item's unit of measure.
Quantity	The quantity of the line item that has been returned.
Unit Price	The price of the line item.
Extended Price	The extended price represents the total of quantity multiplied by the unit price.
Fees	The fee applied to the associated line. Click the hyperlink to view the Overall Return Charges, and Invoiced Return Charges.
Charges	The total charges applied the associated line. Click the hyperlink to view the Overall Return Charges, and Invoiced Return Charges.
Tax	The total taxes applied to the return line. Click the hyperlink to view the , Remaining Return Taxes and .
Line Total	The total cost of the return line after any additional charges, taxes, and fees have been applied.

Table 8–71   Return Refund Summary Screen, Service Request or Delivery Request Summary

Fields	
Line Number	The service or delivery request's line number. Click this link to view the appropriate request detail screen.
Item ID	The service or delivery request's item ID.
UOM	The service or delivery request's unit of measure.
Quantity	The service or delivery request's quantity requested.
Unit Price	The service or delivery request's unit pricing.
Extended Price	The service or delivery request's extended price.

Table 8–71   Return Refund Summary Screen, Service Request or Delivery Request Summary

Fields	
Option Price	The price of any additional service options associated with the service or delivery request.
Discount	The service or delivery request's discount. Click this link to view the appropriate line charges.
Charges	The service or delivery request's charges. Click this link to view the appropriate line charges.
Taxes	The service or delivery request's taxes. Click this link to view the appropriate line taxes.
Line Total	The service or delivery request's line grand total charges.

8.38 Overall Return Charges

You can view the header level charges of an return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Overall Return Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category.
Charge Name	The name of the charge.
Charge Amount	The amount of charge applied at the header level.

Overall Return Taxes - You can view the header level tax information associated with a return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

Overall Return Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax.
	Important: You must associate a return header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a return header level tax to a price value.
Charge Name	The charge name associated with the tax.
	Important: You must associate a return header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a return header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied to the header level.

- **Remaining Return Charges** - You can use the Remaining Return Charges Detail window for adding or modifying the return charges.

   Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

- **Adding Remaining Return Charges** - From the Charges table, choose ✚. A new row appears in the Charges table. From the Charge Category drop-down list, select the category of the new charge.

   Note: This drop-down displays all return charges and discount charges. Consult your system administrator to determine which charges should be used as return charges.

Remaining Return Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.

Fields	Description
Charge Name	The name of the charge. Once you select the charge category, this field is populated with a drop-down list. Select the appropriate charge name.
Charge Amount	The amount of charge applied at the header level.

Click Save after making changes to the charges panel to update the remaining return charges. The Return Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

- **Modifying Remaining Return Charges** - Locate the charges you want to modify. In the charges panel enter the amount of the charges and click Save. The Return Modification Reason screen appears, enter the appropriate reason code and text and click OK.

8.39 Remaining Return Taxes

You can use the Remaining Return Taxes window for adding or modifying the return taxes.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen.

> **Note:** This drop-down displays all return charges and discount charges. Consult your system administrator to determine which charges should be used as return charges.

- **Adding Remaining Return Taxes** - From the Taxes panel, choose ╬. A new row appears in the Taxes panel. From the Charge Category drop-down list, select the category of the new charge and from Tax category select a new tax name and enter the relevant information as defined in the following table.

Remaining Return Taxes Screen, Taxes

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.

Fields	Description
Charge Name	The name of the charge. Once you select the charge category, this field is automatically populated with a drop-down list. Select the appropriate charge name from the list.
Charge Amount	The amount of charge applied at the header level.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied at the header level.

Click Save after making changes to the taxes panel to update the remaining return taxes. The Return Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

- **Modifying Remaining Return Taxes** - Locate the taxes you want to modify. In the taxes panel, enter the amount of the taxes and click Save. The Return Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

8.40 Invoiced Return Charges

You can view the invoice level charges of a return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen. If you view the invoiced return charges from the Return Invoices screen the return header panel is replaced with fields described in the Invoices table.

Invoiced Return Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category.
Charge Name	The name of the charge.
Charge Amount	The amount of charge applied at the header level.

Invoiced Return Taxes -You can view the invoice level tax information associated with an return.

Refer to the Return table for more information about field descriptions of the return header panel seen in this screen. If you view the invoiced return charges from the Return Invoices screen the return header panel is replaced with fields described in the Invoices table.

Invoiced Return Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax.
	Important: You must associate a return header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a return header level tax to a price value.
Charge Name	The charge name associated with the tax.
	Important: You must associate a return header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a return header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied to the header level.

Add Order Line - You can add any line from an order document that is in Shipped status to the return release. To add an order line, from the Return Detail screen, return order lines panel select `Add Order Line` and this screen pops open.

> **Note:** You can only add orders lines from orders that have the same Seller, Buyer, currency, and Enterprise as the original order associated with the return.

Table 8–72   Enter Order Number

Field	
Enterprise	The enterprise of the associated order line.
Order #	The order number associated with an order line that can be added to this return. Select the lookup icon to search for orders. The Order List Lookup screen appears. Select the relevant orders and click `Select For Return`.

Enter the Order # and click OK to return to the Returnable Order Lines screen. In this screen, select the orders that can be added to this return order.

Table 8–73   Returnable Order Lines Screen, Returnable Order Lines

Fields	
Line	The return line number being authorized.
Item ID	The the item ID of the return item being authorized.
PC	The return item's product class.
UOM	The return item's unit of measure.
Description	The return item's description.
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the inventory batch number the return line belongs to, click the hypertext link.
Ship By Date	The date by which the return item should be shipped.
Available To Return	The quantity of the return item available to be returned.

Table 8–73   Returnable Order Lines Screen, Returnable Order Lines

Fields	
Return Qty	Enter the quantity of the item being returned in the return line.
Line Type	From the drop-down, select the line type.
Reason Code	From the drop-down, select the reason for the item being returned.
Return To Node	Enter the node handling the return line.

Select the order lines that you want to add to the return order and click Save.

8.41 Return Line Detail

You can view the return line details by selecting the return lines in the Return Detail screen and clicking View Details.

Table 8–74   Return Line Detail Screen, Return Line

View Icons	
	Releases - This icon takes you to the Return Line Releases screen where you can view the list of order releases based on the release number, ship node and status.
	Instructions - This icon lets you view the Return Line Releases screen where you can add, modify or delete the instructions for a order line.
	Kit Components - This icon takes you to the Kit Components where you can view the kit components associated with the order line.
	More Addresses - This icon takes you to the More Return Line Addresses screen where you can add or modify forwarding address.
	Item Attributes - This icon takes you to the Item Attributes screen where you can specify additional attributes for item and delivery.

Table 8−74   Return Line Detail Screen, Return Line

	Receipt History - This icon takes you to the Receipt Detail screen where you can view the receipts associated with this return line.
	Related Orders - This icon lets you view the Related Order Lines screen. For example you can view the Return Orders created from the order console by clicking this icon.
	Order Line Dates - This icon takes you to the Return Line Dates screen to view the requested, expected and actual date type for the given order line.
	View Work Orders - This icon takes you to the Work Order Details screen where you can view the related work orders associated with this order line.
	Return Line Audits - This icon takes you to the Return Line Audits screen where you can view the list of audits done for that order line.
Fields	
Return #	The return number associated with the return line. Click this link to view the Return Detail.
Line #	The return line number.
Line Quantity	The quantity of the return line item returned. This field can be modified.
Item ID	The item ID. Click this link to view the ship node details. For more information about this screen, see the *Sterling Global Inventory Visibility: User Guide*.
Unit of Measure	The line item's unit of measure.
Product Class	The item classification such as first quality, second quality, or finished good.
Description	A brief description of the line item. This field can be modified.
Status	The current status of the return line. Click this link to view the Return Line Status Breakup screen.
Return to Node	The node handling the return.

The charges and taxes panel are defined below the return line panel.

> **Note:** This panel displays all order fees, charges and taxes against the overall, open and invoiced prices.

Table 8–75   Return Line Detail Screen, Charges and Taxes

Fields	
Extended Price	The total of quantity multiplied by unit price.
Option Price	The price of any additional options associated with the item ordered.
Discount	The discount price applied to the associated line. Click the hyperlink to view the Overall Return Line Charges, Remaining Return Line Charges and Invoiced Return Line Charges.
Charges	The total charges applied the associated line. Click the hyperlink to view the Overall Return Line Charges, Remaining Return Line Charges and Invoiced Return Line Charges.
Tax	The total taxes applied to the order line. Click the hyperlink to view the Overall Return Line Taxes, Remaining Return Line Taxes and Invoiced Return Line Taxes.
Totals	The total amount of the associated line after any charges and taxes have been applied.

Refer to the Return From table for field value descriptions of the Return From panel.

Table 8–76   Return Line Detail Screen, Additional Attributes

Fields	
Unit Price	The price of the line item listed by the Seller.
Customer PO #	The customer's purchase order number.
Carrier/Service	The carrier (such as UPS) and service (such as Ground or Next Day Air) that originally shipped the return line. This field can be modified.
Is Returnable	Indicates that this item is configured to be a returnable item as per your business practices.

Table 8—76   Return Line Detail Screen, Additional Attributes

Fields	
Return Window (Days)	Indicates how many days a customer or Buyer has to return the line item after receiving it, as per your business practices.
Credit w/o Receipt	Indicates whether credit can be issued to the customer before physically receiving the return line item.
Invoiced Qty	The quantity of the line item that has been added to a return invoice.
Over Receipt Qty	The quantity of the line item that can be received over the quantity the customer plans to return.
Return Reasons	The reasons the return line items are being returned.
Shipped Quantity	The quantity shipped in the return.
Received Quantity	The quantity received in the return.
Fulfillment Type	The fulfillment type is used to determine if there are any custom requirements used to determine sourcing locations associated with this return.

Table 8—77   Return Line Detail Screen, Pickup Attributes

Fields	
Pickup Method	The method in which this order line reaches its final destination: • Delivery - specialized carrier services, such as piano movers. • Pickup - hold items for the customer to retrieve. • Shipping - typical carrier services, such as UPS.
Carrier Account #	The Carrier organization's account number with your organization. This field can be modified.
Associated Pickup Line Number	The line number and link to the associated pickup service order line, if applicable.
Shipping Paid By	The organization that pays for shipping the return line. This field can be modified.

Table 8–77   Return Line Detail Screen, Pickup Attributes

Fields	
Carrier/Service	The carrier (such as UPS) and service (such as Ground or Next Day Air) for the return line. This field can be modified.
Freight Terms	The freight terms used by the carrier. This field can be modified.

Enter any information in the return line details screen and click Save to update the changes.

8.42 Return Line Releases

If some or all of the line has been released, you can view a list of releases including the line.

To view line releases, from the Return Lines action bar, choose 📇. The Return Line Releases window appears.

Table 8–78   Return Line

Fields	
Return #	The return number associated with the return line. Click this link to view the Return Detail.
Line #	The return line number.
Line Quantity	The quantity of the return line item returned.
Item ID	The product item's ID. Click this link to view the inventory details for the item. For more information about screen reference, see the *Sterling Global Inventory Visibility: User Guide*.
UOM	The line item's unit of measure.
Product Class	The item classification such as first quality, second quality, or finished good.
Description	A brief description of the line item.
Status	The current status of the return line. Click this link to view the Return Line Status Breakup screen.
Return To Node	The node handling the return.

Table 8–78   Return Line

Fields	
Exchange Type	Select the exchange type from the drop-down list. The option of changing the type of an exchange is only available when the order is in `Draft Order Created` status. Once the order is confirmed, you are not able to edit this field. **Note:** This field is only displayed for exchange orders.
Created For Return #	The return order number for which the exchange was created. Click on the hyperlink to see that return order. **Note:** This field is only displayed for exchange orders.

Table 8–79   Return Line Releases Screen, Return Releases

Action	
View Details	This action takes you to the Return Release Details screen, where you can perform activities associated with return releases.
Fields	
Release #	The line release number. Click this link to view the Return Release Details screen.
Return To Node	The node handling the return. Click this link to view the Ship Node Details. For more information about this screen, see the *Sterling Distributed Order Management: User Guide*.
Status	The current status of the return release. Click this link to view the Return Release Status Breakup screen.

8.43 Return Line Instructions

You can add special instructions, such as packaging or handling instructions, to a specific line item.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–80   Instructions

Action	
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the 🔶 icon.

You can also use the Instructions window for:

- **Adding an Instruction** - You can add instructions that add a customer's notes to each return line. Instructions are created to inform the individual responsible for packing the return of the Buyer's special requests. Select the ➕ icon to add the instruction lines and enter the relevant information in the fields as discussed in the Instructions table.

- **Modify an Instruction** - The information in the Return Line Instructions screen can be modified by entering the modified information and selecting Save.

8.44 Kit Components

If the return line item is a kit item. You can view the component items that make up the kit.

To view kit components from the Return Lines action bar, choose 📦. The Kit Components window is displayed. Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–81   Kit Components

Fields	
Kit Code	The item's kit code such as physical kit, logical kit or dynamic physical kit
Item ID	The kit item's ID. Click this link to view the ship node details. For more information about this screen, see the *Sterling Global Inventory Visibility: User Guide*.
PC	The kit item's classification such as first quality, second quality, or finished good.
UOM	The kit item's unit of measure.
Description	A brief description of the kit item.
Qty Per Kit	The quantity of the item per one kit.
Component Quantity	The total quantity of components in the return line.

8.45 More Return Line Addresses

You can view any additional addresses that pertain to a line as per your business practices. For more information about defining additional address types, see the *Sterling Reverse Logistics: Configuration Guide*.

Table 8–82   More Return Line Addresses

View Icon	
	Address Details - Choose this icon to view or modify the return line addresses. For more information about the screen that is displayed, see Organization Address Details Screen.
The name and address of the person or organization where the return is addressed.	

8.46 Item Attributes

You can view Item Attributes of an order line by clicking the 🏠 icon in the Return Line Detail screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–83   Item Attributes Screen, Item Attributes

Fields	
Classifications	This panel is described in the "Item Attributes Screen, Classifications" table.
Other Attributes	This panel is described in the "Item Attributes Screen, Other Attributes" table.
Customer Item	The customer's item ID.
Customer Item Description	The customer's item description.
Manufacturer Item	The manufacturer's item ID.
Manufacturer Item Description	The manufacturer's item description.
Supplier Item	The supplier's item ID.
Supplier Item Description	The supplier's item description.

Table 8–84   Item Attributes Screen, Classifications

Fields	
NMFC Class	The NMFC Class.
NMFC Code	The NMFC code.
NMFC Description	The NMFC description.
ISBN	The ISBN number.
Harmonized Code	The harmonized code.
Tax Product Code	The tax product code.
ECCN No	The ECCN number.
Schedule B Code	The schedule B code.
UPC Code	The UPC code.

Table 8–85   Item Attributes Screen, Other Attributes

Fields	
Country of Origin	The country the item is manufactured in.
Import License No	The import license number.
Import License Validity	The date the import license is valid through.
Product Line	The product line.
Manufacturer	The item's manufacturer.
Unit Cost	The manufacturer's price per unit.
Item Weight	The item's weight.
Item Weight UOM	The weight unit of measure used for the item.

Enter necessary information in the fields and click `Save`.

8.47 Receipt Detail

You can view the list of receipts associated with a return line in this screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–86   Receipt Detail Screen, Return Receipt Lines

Action	
View Details	This action takes you to the Return Order Receipt Summary screen, where you can perform activities associated with return receipts.
Fields	
Line #	The line number of the return receipt.
Receipt #	The receipt number. Click this link to view the Return Order Receipt Summary screen.
Serial #	The serial number associated with this receipt line.
Lot #	The lot number associated with this receipt line.
Ship By Date	The date by which the item has to be shipped.

Table 8–86   Receipt Detail Screen, Return Receipt Lines

Qty	The quantity of the items in the receipt.
Disposition	The disposition method entered when creating the receipt.
User	The user who created the receipt.
Comments	The comments entered by the user.

8.48 Related Order Lines

To view an order line's chained order lines, from the Return Line Detail action bar, choose 🖼️. The Related Orders window including any lines the specific line is chained to or derived from is displayed.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–87   Related Orders Screen, Sales Order Lines

Action	
View Details	This action takes you to the Order Details screen where you can perform actions on the order. For more information about this screen, see the *Sterling Distributed Order Management: User Guide*.
Fields	
Order #	The sales order number related to this return line. Click this link to view the order details.
Relationship	The relationship of the sales order with this return line.
Status	The status of the sales order. Click this link to view the Order Status Breakup screen. For more information about this screen, see the *Sterling Distributed Order Management: User Guide*.
Buyer	The buyer organization of this order.
Seller	The seller organization of this order.

8.49 Return Line Dates

You can view any custom dates that have been configured for monitoring. For more information about monitoring, see the *Sterling Reverse Logistics: Configuration Guide.*

You can view return line dates of an return line by clicking the ⬚ icon in the Return Line Detail screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–88   New Dates

Fields	Description
Date Type	The custom date type.
Requested	The date on which the date type is requested to be met.
Expected	The date on which the date type is expected to be met.
Actual	The date on which the date type actually needs to be met.

Click Save to update the new dates.

8.50 Return Line Audits

You can view audits logged against a return line. An audit is logged against a Return line when any type of modification is made to the Order line.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–89   Return Line Audits Screen, Return Line Audits

Action	
View Details	This action takes you to the Return Audit Details screen for the selected order lines.
Fields	

Table 8–89   Return Line Audits Screen, Return Line Audits

Order Created in Sterling	The date and time the return was created in our system.
Audit #	The audit identification number. Click the audit identification number to view the Return Audit Details screen.
Date	The date and time the modification was carried out.
Modified By	The user that performed the modification.
Reason	The reason the modification occurred and additional information explaining the modification entered by the user.
Modification type	The type of modification performed.

8.51 Return Line Status Breakup

You can view the return line's breakup by status in this screen. Click the Status link in the Return Detail screen to view the status breakup.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–90   Return Line Status Breakup Screen, Status Breakup

Field	
Last Changed On	The last date on which the status was changed.
Status	The current status of the return line.
Quantity	The quantity of the return line.

8.52 Overall Return Line Charges

You can view the header level charges of a return line in this screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8−91   Overall Return Line Charges Screen, Charges

Fields	
Quantity	The quantity of the line item that has been returned.
Unit Price	The price of the line item. This field can be modified.
Extended Price	The total of quantity * unit price.
Charge Category	The name of the discount category.
Charge Name	The name of the discount charge.
Per Unit	The amount of the discount charge applied to an individual line item.
Per Line	The amount of the discount charge applied to the entire return line.
Charge Amount	The amount of the discount charge that is applied to the return line level. **Note:** During invoicing, this charge is applied to the first shipment received, in the case of multiple shipments.

8.53 Overall Return Line Taxes

You can view the header level tax information associated with a return line.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8−92   Overall Return Line Taxes Screen, Taxes

Fields	
Ordered Quantity	The quantity of the line item that has been returned.
Pricing UOM	The pricing's unit of measure.
Unit Price	The price of the line item.
Extended Price	The total of quantity * unit price.

Table 8–92   Overall Return Line Taxes Screen, Taxes

Fields	
Apply to Price	Select Apply To Price to create a tax that applies to the unit price of the line
	Note: A line tax can be applied to either a charge or the price. If you select Apply To Price, charges are not accessible.
Charge Category	The charge category with which the tax is associated.
	Important: A return header level tax must be associated with a charge, otherwise it is calculated as 0.
	Note: An return header level tax cannot be applied to a price value.
Charge Name	The charge name with which the tax is associated.
	Important: An return header level tax must be associated with a charge, otherwise it is calculated as 0.
	Note: An return header level tax cannot be applied to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax that is applied to the header price.
Tax Amount	The amount of the tax that is applied to the header level.

8.54 Remaining Return Line Charges

You can view specific line level charges details in this screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–93   Remaining Return Line Charges Screen, Charges

Field	Description
Open Quantity	The quantity of the line item that has been returned.
Pricing UOM	The pricing's unit of measure.

Table 8–93   Remaining Return Line Charges Screen, Charges

Field	Description
Unit Price	The price of the line item. This field can be modified.
Extended Price	The total of quantity * unit price.
Charge Category	The category of the charge.
Charge Name	The name of the charge.
Per Unit	The amount of the charge applied to an individual line item.
Per Line	The amount of the charge applied to the entire return line.
Charge Amount	The amount of the charge that is applied to the return line level.

You can also use the Remaining Return Line Charges window for:

- **Adding Remaining Return Line Charges** - From the Charges table, choose ➕. A new row appears in the Charges table. From the Charge Category drop-down list, select the category of the new charge.

> **Note:**   This drop-down displays all return charges and fees. Consult your system administrator to determine which charges should be used as return charges and which should be used as fees.

Click Save after making changes to the charges panel to update the remaining order charges. The Modification Reason screen appears, enter the appropriate reason code and text and click OK.

- **Modifying Remaining Return Line Charges** - Locate the charges you want to modify. In the charges panel enter the amount of the charges and click Save. The Modification Reason screen appears, enter the appropriate reason code and text and click OK.

8.55 Remaining Return Line Taxes

You can add or modify the open return line taxes in this screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–94   Remaining Return Line Taxes Screen, Taxes

Field	Description
Remaining Quantity	The quantity of the line item that has been returned.
Pricing UOM	The pricing's unit of measure.
Unit Price	The price of the line item.
Extended Price	The total of quantity * unit price.
Apply to Price	Select Apply To Price to create a tax that applies to the unit price of the line **Note:** If you select Apply To Price, you cannot select a charge name because you can create a tax that applies to the price or a tax on the existing line charge.
Charge Category	The charge category the tax is associated with, if applicable.
Charge Name	The charge name the tax is associated with, if applicable.
Charge Amount	The charge amount that is taxed, if applicable.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax that is applied to the return line price.
Tax Amount	The amount of the tax that is applied to the return line level.

- **Adding Remaining Return Line Taxes** - From the Taxes panel, choose ➕. A new row appears in the Taxes panel. From the Charge Category drop-down list, select the category of the new charge and from Tax category select a new tax name and enter the relevant information as defined in the table above.

> **Note:** This drop-down displays all order taxes and fee taxes. Consult your system administrator to determine which charges should be used as order taxes and which should be used as fee taxes.

Click Save after making changes to the taxes panel to update the remaining return taxes. The Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

- **Modifying Remaining Return Line Taxes** - Locate the taxes you want to modify. In the taxes panel enter the amount of the taxes and click Save. The Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

8.56 Invoiced Return Line Charges

You can view the invoice level charges of an return line.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8−95   Invoiced Return Charges Screen, Charges

Fields	
Invoiced Quantity	The quantity of the line item that has been invoiced.
Pricing UOM	The pricing's unit of measure.
Unit Price	The price of the line item.
Extended Price	The total of quantity * unit price.
Charge Category	The name of the charge category.
Charge Name	The name of the charge name.
Per Unit	The amount of the charge applied to an individual line item.
Per Line	The amount of the charge applied to the entire return line.
Charge Amount	The amount of the charge that is applied to the header level.

8.57 Invoiced Return Line Taxes

You can view the invoice level tax information associated with an return line.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–96   Invoiced Return Taxes Screen, Taxes

Fields	
Quantity	The quantity of the line item that has been invoiced.
Unit Price	The price of the line item.
Extended Price	The total of quantity * unit price.
Apply To Price	Select Apply To Price to create a tax that applies to the unit price of the line **Note:** If you select Apply To Price, you cannot select a charge name because you can create a tax that applies to the price or a tax on the existing line charge.
Charge Name	The charge category and name the tax is associated with, if applicable.
Charge Amount	The charge amount that is taxed, if applicable.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax that is applied to the line price.
Tax Amount	The amount of the tax that is applied to the invoice's line.

8.58 Return Release Search By Status

You can search for return releases based on their status in this screen.

> **Note:** Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 8–97   Return Release Search by Status

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Across Enterprises	Select this option if you are searching across all enterprises.
Return #	Enter the return number of the return releases you are searching for, if applicable.
Return Date	Enter the date range through which the return releases you are searching for were returned, if applicable.
Order #	Enter the order number from which the return releases you are searching for were created, if applicable.
Release #	Enter the release number of the return release you are searching for, if applicable.
Buyer	Enter the Buyer associated with the return releases you are searching for, if applicable.
Seller	Enter the Seller associated with the return releases you are searching for, if applicable.
Pickup Method	Select the pickup method used to get the product items to the recipient, if applicable.
Return Release Line Status	Select the status range of the return releases you want to search for, if applicable.

Table 8–97   Return Release Search by Status

Fields	
Return To Node	Enter the return node the return releases you are searching for was released to, if applicable.
Max Records	Enter the maximum number of return releases you want returned from your search.

The Return Release List is displayed as a result of this search.

8.59 Return Release List

The Return Release List window displays the results of a return release search. You can perform actions on a single return release or multiple return releases by selecting the check boxes of the return releases you want to perform an action on and choosing the applicable action from the action bar.

Table 8–98   Return Release List

Actions	
View Details	This action takes you to the Return Release Details screen where you can start the receipts, create shipments and view release details.
View More Addresses	This action takes to More Order Release Addresses screen where you can view additional addresses associated with the release.
Create Shipment	This action creates a shipment for the return release and pops up the Return Shipment Details screen.
Fields	
Return #	The return number.
Release #	The return release number. Click this link to view the Return Release Details.
Status	The return release status.
Enterprise	The Enterprise organization associated with the return release.
Buyer	The Buyer organization that created the return.

Table 8–98   Return Release List

Return Date	The date the return was created.
Return To Node	The node that is handling the return.

8.60 Return Release Details

You can view the details of the return releases in this screen.

Table 8–99   Return Release Details Screen, Return Release

View Icons	
	Receipts - This icon takes you to the Return Receipt List screen where you can view the list of receipts associated with this return line.
	More Addresses - This icon takes you to the More Order Release Addresses screen where you can add or modify return address.
	Return Release Dates - This icon takes you to the Return Release Dates screen to view the requested, expected and actual date type for the given release.
	Shipments - This icon takes you to the Return Release Shipments screen where you can view the list of shipments for the return release.
Actions	
Start Receipt	This action takes you to the Start Receipt screen where you can create receipts for the returns.
Close Receipt	This action closes the receipt when you click OK in the alert screen that pops open to confirm the closing.
Create Shipment	This action creates the shipment for the releases and takes you to the Return Shipment Details for entering any details for the created shipment.
Report/Record Receipt	This action takes you to the Receive screen to receive any return lines in the receipt. If you do not have a receipt that is started, this action takes you to the Start Receipt screen.
Fields	
Enterprise	The Enterprise associated with the return.

Table 8–99   Return Release Details Screen, Return Release

Buyer	The Buyer organization that created the return.
Seller	The Seller organization that is handling the return.
Return #	The return number. Click this link to view the Return Detail.
Status	The current status of the return. Click this link to view the Return Release Status Breakup screen.
Created On	The date the release was created.
Return Type	This field can be customized as needed.
Release #	The release number.
Ship Advice #	The ship advice number associated with this return.

Refer to the Return From table for the field descriptions of the Return From panel.

Table 8–100   Notes Screen, Notes

Fields	
Contact Time	The time at which this note was added to the work order. This is defaulted to the creation time of the Notes pop-up window.
Contact User	The user who created this note. This is defaulted to the logged on user.
Reason Code	The reason code for this note.
Contact Type	The type of contact information on this note, for example phone or e-mail.
Contact Reference	The contact information on this note. For example, if contact type is phone, the contact's phone number can be entered here. If contact type is e-mail, the contact's e-mail address can be entered.
Add Note	The note for this work order.

Enter the relevant information and click Save to create the note.

Table 8–101   Return Release Details Screen, Additional Attributes

Fields	
Return To Node	The return to node.
Delivery Method	The delivery method.
Work Order #	The work order number.
Appointment	The appointment date and time.

Table 8–102   Return Release Details Screen, Return Release Lines

Actions	
Receive	This action takes you to the Receive Return Line screen where you can receive the selected release lines.
Receive Kit	This action takes you to the Receive Return Line Kit screen where you can receive the selected release line kits.
Add Order Line	This action takes you to the screen where you can add the relevant order lines to the release.
Fields	
Line	The return release line number. Click this link to view the Return Line Detail.
Item ID	The item ID.
PC	The item classification such as first quality, second quality, or finished good.
UOM	The item's unit of measure.
Description	A description of the item.
Description	A description of the return release line.
Reason Code	The reason the return release line was returned.
Line Type	The return release line type. For example, `Credit` is a line type.

Table 8–102   Return Release Details Screen, Return Release Lines

Line Qty	The amount of line items that have not yet been scheduled and released. This field can be modified. **Note:** Entering '0' indicates a quantity of zero. Leaving this field blank indicates you want to ignore the line.
Status	The current status of the return line. Click this link to view the Return Line Status Breakup screen.

8.61 Return Release Receipts

You can view receipts created against return items that have been received by the return node. From the Return Release action bar, choose ⬚. The Return Receipts List screen appears.

Table 8–103   Return Release

Fields	
Enterprise	The Enterprise associated with the return.
Buyer	The Buyer organization that created the return.
Seller	The Seller organization that is handling the return.
Return #	The return number. Click this link to view the Return Detail.
Status	The current status of the return. Click this link to view the Return Release Status Breakup screen.
Created On	The date the release was created.
Return Type	This field can be customized as needed.
Release #	The release number.
Ship Advice #	The ship advice number associated with this return.

Table 8–104   Return Release Receipts

Action	
View Details	This action takes you to the Return Receipt Details screen for the selected return release receipts, where you can view the details of the receipts.
Fields	

Table 8–104   Return Release Receipts

Receipt #	The receipt number. Click this link to view the Return Receipt Details.
Receipt Date	The date the receipt was made.
Open	Indicates if the receipt is open or not. If it is still open the receipt could be waiting for additional items to be returned to begin inspection.
Number of Cartons	If the return items were shipped back in carton containers, this field indicates how many carton containers have been received.
Number of Pallets	If the return items were shipped back on pallet containers, this field indicates how may pallet containers have been received.

8.62 More Order Release Addresses

You can view any additional addresses that pertain to a release as per your business practices. To view a release's additional addresses from the Return Release action bar, choose 🖼. The Additional Addresses window appears.

Refer to the Return Release table for more information about field descriptions of the return releases header panel seen in this screen.

8.63 Return Release Dates

You can view any custom dates that have been configured for monitoring. For more information about monitoring, see the *Sterling Reverse Logistics: Configuration Guide.*

You can view release dates of an return by clicking the 🖳 icon in the Return Release Details screen.

Refer to the Return Release table for more information about field descriptions of the return releases header panel seen in this screen.

Table 8–105   New Dates

Fields	Description
Date Type	The custom date type.
Requested	The date on which the date type is requested to be met.
Expected	The date on which the date type is expected to be met.
Actual	The date on which the date type actually needs to be met.

Click Save to update the new dates.

8.64 Return Release Shipments

You can view the list of shipments created for a particular return release. You can view release shipments of an return by clicking the ![icon] icon in the Return Release Details screen.

Refer to the Return Release table for more information about field descriptions of the return releases header panel seen in this screen.

Table 8–106   Return Release Receipts

Action	
View Details	This action takes you to the Return Shipment Details screen for the selected return release shipments, where you can view the details of the shipment.
Fields	
Shipment #	The shipment number. Click this link to view the Return Shipment Details.
Shipper's Ref. #	The return shipment reference number.
Expected Ship Date	The expected shipment date of the release.
Ship Mode	The shipment mode. For more information, refer to the *Sterling Reverse Logistics: Configuration Guide*.
Return To Node	The return shipment's destination node.

Table 8–106   Return Release Receipts

Receive Node	The return shipment's receive node.
Status	The return shipment status.

8.65 Start Receipt

You can create a new receipt for return items received by the return node.

Table 8–107   Start Receipt

Field	
Receipt #	The receipt number from which items are being received.
Receiving Node	The node receiving the return.
Enterprise	The Enterprise associated with the return.
Order #	The order number of the order associated with the return.
Release #	The release number from which items are being received.
Pro #	
Receipt Date	Enter the date the return items are being received.
Buyer	The buyer associated with the return.
Seller	The seller associate with the return.
Number of Cartons	If the return items were shipped back in carton containers, enter how many carton containers have been received.
Number of Pallets	If the return items were shipped back on pallet containers, enter how may pallet containers have been received.

Enter the necessary information and click OK to start the receiving process.

8.66 Return Release Status Breakup

You can view a release's breakup by status.

To view a return release's status breakup choose the Status link from the Return Release Details screen. The Return Release Status Breakup screen appears.

Refer to the Return Release table for more information about field descriptions of the return releases header panel seen in this screen.

Table 8–108   Return Release Status Breakup

Fields	
Line #	The return release line number.
Item ID	The item ID.
PC	The item classification such as first quality, second quality, or finished good.
UOM	The line item's unit of measure.
Return To Node	The node handling the return.
Status	The current status for that part of the release line.
Quantity	The quantity of the line item returned. This field can be modified.
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the return line, click the hypertext link.

8.67 Receive Return Line

You can create a receipt for an individual line item that is received at the return node from the Return Release Details screen.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–109   Notes Screen, Notes

Fields	
Contact Time	The time at which this note was added to the work order. This is defaulted to the creation time of the Notes pop-up window.
Contact User	The user who created this note. This is defaulted to the logged on user.
Reason Code	The reason code for this note.
Contact Type	The type of contact information on this note, for example phone or e-mail.
Contact Reference	The contact information on this note. For example, if contact type is phone, the contact's phone number can be entered here. If contact type is e-mail, the contact's e-mail address can be entered.
Add Note	The note for this work order.

Enter the relevant information and click Save to create the note.

Table 8–110   Receive Screen, Receipt Information

Fields	
Line #	The line number of the line being received.
Line Quantity	The original line quantity shipped to the Buyer.
Receivable Quantity	The quantity that is available to be received.
Item ID	The item ID of the items being received.
UOM	The line item's unit of measure.
Product Class	The line item's product class.
Description	A description of the line item.
Return Reasons	The reason the line item is being returned.
Line Type	The line type.
Serial #	Enter the serial number that is to be used to identify the receipt.

Table 8–110   Receive Screen, Receipt Information

Fields	
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the inventory batch number the line item being received belongs to, click the hypertext link.
Ship By Date	Enter the date the line item being received had to be shipped to the Buyer by, if applicable.
Qty	Enter the quantity of the line item being received.
Disposition	Select the instructions on how to handle the return items. For example, Restock or Scrap.
Comments	Enter any additional comments regarding the receipt.

Enter the receipt information and click Save to update the changes.

8.68 Receive Return Line Kit

A kit is a group of items listed and priced together under a single item identification code. Once a kit has been received, the parent line is moved to Received as Component status and the kit lines are added.

For example, a gift basket with several individual items, such as fruits, candies, and flowers, that is identified by a single item identification code is a kit item.

You can create a receipt for an individual kit line item that is received at the return node.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–111   Notes Screen, Notes

Fields	
Contact Time	The time at which this note was added to the work order. This is defaulted to the creation time of the Notes pop-up window.
Contact User	The user who created this note. This is defaulted to the logged on user.
Reason Code	The reason code for this note.
Contact Type	The type of contact information on this note, for example phone or e-mail.
Contact Reference	The contact information on this note. For example, if contact type is phone, the contact's phone number can be entered here. If contact type is e-mail, the contact's e-mail address can be entered.
Add Note	The note for this work order.

Enter the relevant information and click `Save` to create the note.

Table 8–112   Receive Kit Screen, Kit Components

Fields	
Kit Details	Click on the + icon to expand or collapse the following dynamic details for the corresponding kit item:

	Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the inventory batch number the line item being received belongs to, click the hypertext link.
	Qty	Enter the quantity of the kit line item being received.
	Disposition	Select the instructions on how to handle the returned items. For example, Restock or Scrap.
	Comments	Enter any additional comments regarding the receipt.

Item ID	The kit item ID of the kit items being received.
UOM	The kit line item's unit of measure.
Description	A description of the kit line item.
Kit Qty	The amount of line items included in the kit.
Open For Receipt	Indicates if the return node handles receipt of this kit item.

Click Save to update the information entered.

8.69 Inspect Return Line

You can inspect the received quantity of a line and determine what should be done with the returned items as per your business practices.

Refer to the Return Line table for more information about field descriptions of the return line header panel seen in this screen.

Table 8–113   Notes Screen, Notes

Fields	
Contact Time	The time at which this note was added to the work order. This is defaulted to the creation time of the Notes pop-up window.
Contact User	The user who created this note. This is defaulted to the logged on user.
Reason Code	The reason code for this note.
Contact Type	The type of contact information on this note, for example phone or e-mail.
Contact Reference	The contact information on this note. For example, if contact type is phone, the contact's phone number can be entered here. If contact type is e-mail, the contact's e-mail address can be entered.
Add Note	The note for this work order.

Enter the relevant information and click Save to create the note.

Table 8–114   Inspect Return Line Screen, Inspect Line

Fields	
Line #	The line number of the line being inspected.
Line Quantity	The original line quantity shipped to the Buyer.
Inspectable Quantity	The quantity that is available to be inspected.
Item ID	The item ID of the items being inspected.
UOM	The line item's unit of measure.
Product Class	The line item's product class.

Table 8–114   Inspect Return Line Screen, Inspect Line

Fields	
Description	The description of the item.
Serial #	The serial number that is to be used to identify the receipt.
Ship By Date	The date the line item being received had to be shipped to the Buyer by, if applicable.
Remaining Qty	The quantity of the line item remaining to be inspected.
Disposition	The instructions on how to handle the return items. For example, Restock or Scrap.
Comments	Enter any additional comments regarding the receipt.
New Disposition	If the method of handling the return changes after inspection, select the new disposition.
Disposition Qty	Enter the quantity of the line item inspected.
Disposition Comments	Enter any comments about the disposition of the line item.

8.70 Return Receipt Search by Receipt

You can search for the return receipts by the receipt serial numbers.

> **Note:** Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 8–115   Return Receipt Search by Receipt

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.

Table 8–115   Return Receipt Search by Receipt

Fields	
Across Enterprises	Select this option if you are searching across all enterprises.
Receiving Node	Enter the receiving node you are searching for, if applicable.
Receiving Dock	Enter the receiving node associated with the return receipts you want to search for, if applicable.
Receipt #	Enter the return receipt number of the return receipts you are searching for, if applicable.
Buyer	Enter the Buyer of the return receipts you want to search for, if applicable.
Seller	Enter the Seller of the return receipts you want to search for, if applicable.
Return #	Enter the return number of the return receipt you are searching for, if applicable.
Shipment #	Enter the shipment number, if applicable
Receipt Date	Enter the receipt date range of the return receipts you are searching for, if applicable.
Receipt Status	Enter the receipt status, if applicable.
Closed Receipts Only	Select to search only against closed receipts, if applicable.
Max Records	Enter the maximum number of return receipts you want returned from your search.

The Return Receipt List is displayed as a result of this search.

8.71 Return Receipt Search By Item

You can search for return receipts based on the product item in the order.

> **Note:** Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 8−116   Return Receipt Search By Item

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Across Enterprises	Select this option if you are searching across all enterprises.
Receiving Node	Enter the receiving node you are searching for, if applicable.
Item ID	Enter the item ID to search for return receipts containing a specific item, if applicable.
Product Class	Select an item product class to search for return receipts containing an item that has a specific product class, if applicable.
Unit of Measure	Select an item unit of measure to search for return receipts containing an item that has a specific unit of measure, if applicable.
Serial #	The serial number to search for, if applicable.
Disposition Code	Select the disposition code you are searching for, if applicable.
Inspection Pending	Select checkbox to search for items that are pending for inspection.
Max Records	Enter the maximum number of return receipts you want returned from your search.

The Return Receipt List is displayed as a result of this search.

8.72 Return Receipt Search By Container

You can search for return receipts by the containers used in the shipping.

> **Note:** Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 8–117   Return Receipt Search By Container

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Receiving Node	Enter the receiving node you are searching for, if applicable.
Pallet ID	Enter the pallet ID you are searching for, if applicable.
Case ID	Enter the case ID you are searching for, if applicable.
Max Records	Enter the maximum number of return receipts you want returned from your search.

The Return Receipt List is displayed as a result of this search.

8.73 Return Receipt List

The Return Receipt List window displays the results of a return receipt search. You can perform actions on a single receipt or multiple receipts by selecting the check boxes of the receipts you want to perform an action on and choosing the applicable action from the action bar.

Table 8–118   Return Receipt List

Actions	
View Summary	This action takes you to the Return Order Receipt Summary screen where you can view the summary of the receipt and inspect the returned items.

Table 8–118   Return Receipt List

View Details	This action takes you to the Return Receipt Details screen to view the details of the return receipts.
Close Prereceipt	This action closes any of the prereceipts.
Close Receipt	This action closes any of the selected receipts.
Report/Record Receipt	This action takes you to the Receive screen to receive any return lines in the receipt. If you do not have a receipt that is started, this action takes you to the Start Receipt screen.
Fields	
Receipt #	The receipt number associated with the return. Click this link to view the Return Order Receipt Summary.
Shipment #	The shipment number associated with the return.
Return #	The return number.
Enterprise	The Enterprise organization associated with the return.
Buyer	The Buyer organization that created the return.
Seller	The Seller organization of the return.
Receipt Start Date	The start date of the receipt process.
Receiving Node	The receiving node.
Receipt Open	Indicates whether the receipt is open or closed.
Status	The return pickup request status.

8.74 Return Order Receipt Summary

You can view the receipt summary of a return in this screen.

Table 8–119   Return Order Receipt

View Icons	
	Details - This icon takes you to the Return Receipt Details screen where you can view the receipt details and inspect the items.
	Instructions - This icon lets you view the Receipt Instructions screen where you can add, modify or delete the instructions for the receipts.

Table 8–119   Return Order Receipt

📖	**Status Audits** - This icon takes you to the Receipt Status Audit screen where you can view the audit status of the receipts.
	Expected Receipt - This icon takes you to the Expected Receipt screen where you can view the expected receipt lines associated with a receipt header.
Actions	
Close Receipt	This action closes any of the selected receipts.
Report/Record Receipt	This action takes you to the Receive screen to receive any return lines in the receipt. If you do not have a receipt that is started, this action takes you to the Start Receipt screen.
Fields	
Receipt #	The receipt number.
Shipment #	The shipment number. Click this link to view the Return Shipment Details.
Enterprise	The Enterprise associated with the shipment.
Buyer	The Buyer organization that placed the return.Click this link to view the Organization Details.
Seller	The Seller organization that is handling the return. Click this link to view the Organization Details.
Receipt Start Date	The start date of the receipt.
Receiving Node	The node that received the receipt. Click this link to view the ship node detail. For more information about this screen, see the *Sterling Distributed Order Management: User Guide*.
Receipt Status	The status of the receipt. Click this link to view the Receipt Status Audit.
Receipt Open	Indicates if the receipt is still open.
No Of Pallets	Indicates the number of pallets.
No Of Cartons	Indicates the number of cartons.

You can view the associated items and perform some actions on the receipt in the Items panel.

Table 8–120   Return Order Receipt Summary Screen, Items

Action	
View Details	This action takes you to the Order Receipt Container screen for viewing the container details of the receipt items.
Inspect	This action takes you to the Inspect Return Receipt Details screen for inspecting the receipt items.
Fields	
Item ID	The return line item's item ID.
Item Description	The description of the receipt line item.
PC	The return line item's product class.
UOM	The return line item's unit of measure.
Disposition Code	The disposition code.
Return #	The return number to which the return line belongs.
Line #	The return line number.
Release #	The release number to which the return line belongs.
Tag	The tag number is displayed in this field. Click this link to view the Receipt Line Details.
Net Weight	The net weight of the item.
New Weight UOM	The net weight of the unit of measure of the item.
Quantity	The quantity of the receipt line.

8.75 Return Receipt Details

You can view the receipt details associated with a return.

Table 8–121   Receipt

Fields	
Receipt #	The receipt number.
Shipment #	The shipment number. Click this link to view the Return Shipment Details.
Enterprise	The Enterprise associated with the shipment.

Table 8–121   Receipt

Fields	
Buyer	The Buyer organization that placed the return.Click this link to view the Organization Details.
Seller	The Seller organization that is handling the return. Click this link to view the Organization Details.
Receipt Start Date	The start date of the receipt.
Receiving Node	The node that received the receipt. Click this link to view the ship node detail. For more information about this screen, see the *Sterling Distributed Order Management: User Guide*.
Receipt Status	The status of the receipt. Click this link to view the Receipt Status Audit.
Receipt Open	Indicates if the receipt is still open.
No Of Pallets	Indicates the number of pallets.
No Of Cartons	Indicates the number of cartons.

Table 8–122   Return Receipt Details Screen, Receipt Lines

Action	
View Details	This action takes you to the Order Receipt Container screen for viewing the container details of the receipt items.
Inspect	This action takes you to the Inspect Return Receipt Details screen for inspecting the receipt items.
Fields	
Item ID	The return line item's item ID.
Item Description	The description of the receipt line item.
PC	The return line item's product class.
UOM	The return line item's unit of measure.
Disposition Code	The disposition code.
Return #	The return number to which the return line belongs.
Line #	The return line number.

Table 8–122   Return Receipt Details Screen, Receipt Lines

Release #	The release number to which the return line belongs.
Ship By Date	The item's expiration date.
COO	The country of origin.
Serial #	The item's serial number.
Tag	The tag number is displayed in this field. Click this link to view the Receipt Line Details.
Quantity	The quantity of the receipt line.

8.76 Receipt Instructions

You can view the view special receipt instructions associated with a return.

Refer to the Receipt table for more information about field descriptions of the receipt header panel seen in this screen.

Table 8–123   Instructions

Action	
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the ☻ icon.

You can also use the Instructions window for:

- **Adding an Instruction** - You can add instructions that add a customer's notes to each receipt summary. Instructions are created to inform the individual responsible for instructing the return of the Buyer's special requests. Select the ✚ icon to add the instruction

lines and enter the relevant information in the fields as discussed in the Instructions table.

- **Modify an Instruction** - The information in the Receipt Instructions screen can be modified by entering the modification and selecting `Save`.

8.77 Receipt Status Audit

You can view the receipt status audit associated with a return.

Refer to the Receipt table for more information about field descriptions of the receipt header panel seen in this screen.

Table 8–124   Receipt Status Audits Screen, Status Audit List

Fields	
Modified By	The login ID of the person who performed the modification.
Old Status	The status prior to the modification.
Old Status Date	The date the prior status was updated.
New Status	The new status.
New Status Date	The date the new status was updated.
Reason Code	The reason code for the receipt status modification.
Reason Text	The reason text for the receipt status modification.

8.78 Expected Receipt

You can view the expected receipt lines associated with a return in this screen.

Refer to the Receipt table for more information about field descriptions of the receipt header panel seen in this screen.

Table 8–125   Expected Receipt Screen, Expected Receipt Lines

Fields	
Shipment Line	The shipment line of the receipt. If there is no shipment created for this receipt, then this field value is 0.
Return #	The return number associated with the receipt.
Release #	The release number associated with the receipt.
Item ID	The item ID.
Unit of Measure	The item's unit of measure.
Product Class	The item's product class.
Expected Quantity	The quantity that is expected to be received.
Received Quantity	The actual quantity that is received.

8.79 Order Receipt Container

You can view the item containers in this screen. You can view this screen by selecting the item details in the Return Order Receipt Summary screen.

Table 8–126   Order Receipt Containers Screen, Item Header

Fields	
Receipt #	The receipt number associated with the item.
Shipment #	The shipment number of this item.
Enterprise	The enterprise associated with the return receipt.
Receiving node	The node that is receiving the item.
Receipt status	The status of the receipt. For example `Received`.
Item ID	The item ID that is associated with the receipt.
Description	The description of the item.
PC	The product class of the item.
Unit of Measure	The unit of measure of the item.
Tag #	The tag number associated with the item.

Table 8–126   Order Receipt Containers Screen, Item Header

Fields	
Order #	The name of the order associated with the return receipt.
Line #	The order line number.
Release #	The release number of the order.

Table 8–127   Order Receipt Containers Screen, Item Containers

Fields	
Serial #	The serial number of the receipt.
Quantity	The number of containers being used in this receipt.

8.80 Inspect Return Receipt

You can enter the return receipt criteria in this screen.

Table 8–128   Inspect Receipt, Return Receipt

Fields	
Node	Select the node where the receipt has been received.
Enterprise	Select the enterprise associated with the return receipt.
Location	Enter the location where the receipt has been received. Choose lookup option to find the specific Location you want to search for.
Pallet ID	Enter the pallet LPN associated with the container.
Case ID	Enter the case LPN associated with the container.
Item ID	Enter the item ID you want to inspect associated with the receipt. Choose lookup option to find the specific Item ID you want to search for.

Table 8–128   Inspect Receipt, Return Receipt

Fields	
Product Class	Select the product class. Product class indicates the item's inventory categorization.
	Orders are placed for an item and product class. Typical examples are Irregular, FD (Factory Defects).
Unit Of Measure	Select the unit of measure you want to inspect.
Receipt #	Enter the return receipt number you want to inspect.
	Choose lookup option to find the specific Receipt Number you want to search for.
Serial #	Enter the item's serial number you want to inspect, if applicable.
Inventory Status	Select the inventory status of the receipt you want to inspect.

Click Proceed. The Inspect Return Receipt Details screen is displayed and you can view the return receipt's item details.

8.81 Inspect Return Receipt Details

Enter the inspection details for receipts that are pending for inspection. You can also view the return receipt items and receipts that are already inspected.

Table 8–129   Return Receipt Item

Fields	
Receipt #	The receipt number. Click this link to view the Return Order Receipt Summary.
Shipment #	The shipment number. Click this link to view the Return Shipment Details.
Return #	The return number associated with this receipt.
Item ID	The receipt item's item ID.
PC	The receipt item's product class.
UOM	The receipt item's unit of measure.

Table 8–129   Return Receipt Item

Fields	
Receipt Status	The status of the receipt. Click this link to view the Receipt Status Audit.
Receiving Node	The node that received the receipt. Click this link to view the ship node detail. For more information about this screen, see the *Sterling Distributed Order Management: User Guide*.

If you have not inspected the receipts the following panel is displayed to enter the inspection details for the receipt.

Table 8–130   Receipt Lines to Be Inspected

Fields	
Line	The receipt line number.
Serial #	The serial number.
Ship By Date	The date by which the inventory must be shipped.
Disposition	The disposition entered during accepting the return against the quantity.
Remaining Qty	The quantity against the disposition.
Comments	Comments entered, if any.
New Disposition	Select the new disposition details of the receipt.
Disposition Qty	Enter the quantity of the disposition against the receipt.
Disposition Comments	Enter the disposition comments, if any.

If you have lines that are already inspected, then the following panel is displayed providing information about the disposition history.

Table 8–131   Receipt Disposition History

Fields	
Line	The receipt line number that has already been inspected.
Serial #	The receipt serial number that has already been inspected.

Table 8–131   Receipt Disposition History

Fields	
Ship By Date	The date by which the inventory must be shipped.
Quantity	The receipt quantity that has already been inspected.
Disposition Code	The disposition code associated with the receipt quantity.
Inspection Date	The inspection date when the receipt was inspected.
User	The user that inspected the receipt.
Comments	The inspection comments for the receipt, if available.

8.82 Receive

If receipts are not available, the Start Receipt window appears. For more information about starting a receipt, see Start Receipt on page 116.

If multiple receipts are available, the Receive window appears. Select the check boxes of the applicable receipts you want to receive and choose the Proceed button.

Table 8–132   Receive, Receipt

Field	
Receipt #	The receipt number associated with the receipt.
Shipment #	The shipment number associated with the receipt.
Enterprise	The enterprise associated with the receipt.
Buyer	The buyer associated with the receipt.
Seller	The seller associated with the receipt.
Receipt Start Date	The receipt start date.
Receiving Node	The node that received the shipment.
Receipt Status	The receipt status.
Receipt Open	Indicates if the receipt is open.
No Of Pallets	The number of pallets.
No Of Cartons	The number of cartons.

Table 8–133   Receive, Lines to Receive

Field	
Pallet ID	This field is displayed only if you are using the Sterling WMS. Click this option button to enter the Pallet ID. | Pallet ID	Enter the Pallet ID.
Pallet Completely Received	Select this check box if the pallet is completely received.	
Case ID	This field is displayed only if you are using the Sterling WMS. Click this option button to enter the Case ID. | Case ID	Enter the Case ID.
Case Completely Received	Select this check box if the case is completely received.	
None	This field is displayed only if you are using the Sterling WMS. Click this option button if neither a pallet nor a case is received.
Shipment Line #	The shipment line number. Click ➕ to add unexpected items in the shipment.
PO #	The purchase order number to which the shipment belongs to.
Release #	The order release number to which the shipment belongs.
Item ID	The item you are receiving is displayed.
Unit Of Measure	The item's unit of measure.
Product Class	The shipment line item's product class.
Total Quantity	The total quantity contained in the shipment line or order line.

Table 8–133   Receive, Lines to Receive

Field	
Received Quantity	The quantity that has been received in the shipment line or order line.
Quantity To Be Received	The total quantity to be received in the shipment line, or the quantity of released items in the order line.
Disposition Code	The disposition code is automatically populated by the system from the receiving rules. Modify the disposition code, if applicable.
Receiving Quantity	Enter the quantity being received in the shipment line.

> **Note:**   If the item is tag-controlled, additional fields are displayed, depending upon the item's tag attributes.
>
> If the item is serial-controlled, an additional field is displayed to let you enter the serial number.

Enter the relevant information and click `Save` to update the changes made to this screen.

8.83 Receipt Line Details

You can view the tag information for a receipt line in this screen. One of the way in which you can view this screen, is to click the Tag # field in the Return Receipt Details screen.

Table 8–134   Receipt Line Details Screen, Receipt Line Header

Fields	
Receipt #	The receipt number associated with the item.
Shipment #	The shipment number of this item.
Enterprise	The enterprise associated with the return receipt.
Receiving node	The node that is receiving the item.
Receipt status	The status of the receipt. For example `Received`.

Table 8–134   Receipt Line Details Screen, Receipt Line Header

Fields	
Item ID	The item ID that is associated with the receipt.
Item Description	The description of the item.
PC	The product class of the item.
Unit of Measure	The unit of measure of the item.
Return #	The name of the return associated with the receipt.
Line #	The order line number.
Release #	The release number of the order.

Table 8–135   Receipt Line Details Screen, Tag Information

Fields	
Tag Identifiers	Displays the unique tag identifiers you have specified for the item (for example, Lot #).

Lot #	The Lot number associated with this tag identifier.
Batch #	The Batch number associated with this tag identifier.
Revision #	The Revision number associated with this tag identifier.

Tag Attributes	Displays any descriptive identifiers you have specified (for example, Manufacture Date).

Lot Key Reference	The Lot key reference associated with this tag attribute.
Manufacturing Date	The manufacturing date for this tag attribute.
Lot Attribute 1	The lot attribute 1 with this tag attribute.

8.84 Pickup Request Search By All Attributes

You can search for pickup requests by all attributes in this screen.

> **Note:** Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 8–136 Return Pickup Request Search By All Attributes

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want to use. Or choose Across Enterprises to use of all the Enterprises.
Return #	Enter the return number associated with the pickup request you are searching for, if applicable.
Buyer	Enter the Buyer associated with the return pickup requests you are searching for, if applicable.
Seller	Enter the Seller associated with the return pickup requests you are searching for, if applicable.
Item ID	Enter the item ID to search for orders containing a specific pickup service item, if applicable.
Appointment	Enter the appointment date range through which you want to search for pickup requests, if applicable.
Max Records	Enter the maximum number of pickup requests you want returned from your search.

The Pickup Request List screen is displayed as a result of this search.

8.85 Pickup Request Search By Draft Returns

You can search for draft pickup request returns in this screen.

> **Note:**   Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 8–137   Return Pickup Request Search by Draft Returns

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Return #	Enter the draft return number you are searching for, if applicable.
Buyer	Enter the Buyer associated with the draft returns you are searching for, if applicable.
Seller	Enter the Seller associated with the draft returns you are searching for, if applicable.
Buyer Account #	Enter the Buyer account number associated with the draft returns you are searching for, if applicable.
Max Records	Enter the maximum number of draft returns you want returned from your search.

The Pickup Request List screen displays as a result of this search.

8.86 Pickup Request List

The Return Pickup Request List window displays the results of a return pickup search. You can perform actions on one or more requests by selecting the check boxes of the requests you want to perform an action on and choosing the applicable action from the action bar.

Table 8–138   Pickup Request List

Actions	
View Details	This action takes you to the Pickup Request Details screen where you can view the details of the requests and the associated order lines for the selected pickup requests.
View Instructions	This action takes you to the Pickup Request Instructions screen where you can enter instructions for the selected pickup requests.
More Addresses	This action takes you to the More Pickup Request Addresses screen where you can add, modify or view additional addresses for the selected pickup requests.
Add Line	This action lets you add a product pickup to the request. For more information refer to Additional Product Lines.
Remove Line	This action removes the selected **Draft** pickup requests only.
Cancel	This action can be used to remove the selected pickup requests.
Fields	
Order #	The sales order associated with the pickup request.
Line #	The line number of the pickup request in the sales order. Click this link to view the Pickup Request Details screen.
Enterprise	The enterprise owner of the order.
Appointment	This field provides the appointment date and time of the pickup request.
Total Amount	The total cost involved for this pickup request.

8.87 Pickup Request Details

The Pickup Request details screen displays all product items associated with a specific pickup request.

Table 8–139   Pickup Request Details Screen, Pickup Request

View Icons	
	View Work Order - This icon takes you to the Work Order Details screen where you can view the related work order associated with this pickup request.
	Instructions - This icon lets you view the Pickup Request Instructions screen where you can add, modify the instructions for the pickup request.
	More Addresses - This icon takes you to the More Pickup Request Addresses screen where you can add or modify addresses.
	Pickup Request Dates - This icon takes you to the Pickup Request Dates screen to view the requested, expected and actual date type for the given request.
	Related Order Lines - This icon lets you view the Related Order lines screen. For example, you can view the sales order lines created from the order console by clicking this icon.
Actions	
Cancel	Select this action to cancel the pickup request. It pops up a Modification Reason screen where you should enter the reason and code before cancelling the pickup request.
Add Line	This action takes you to the Additional Product Lines screen where you can add any product lines to the pickup request.
Fields	
Return Number	The unique identifier of the order. Click this link to view the Return Detail screen.
Item ID	The pickup service item's ID.
Description	The description of the pickup service.
Appointment	The date and time of the pickup.
Line Number	The line number of the pickup service.

Table 8–139   Pickup Request Details Screen, Pickup Request

UOM	The units of measure in which the pickup service is calculated.
Ship Node	The node that performs the pickup.
Status	The status of the pickup request.
Line Quantity	The quantity used to measure the pickup service.
Document Type	The document type associated with the pickup request.

Table 8–140   Pickup Request Details Screen, Charges and Taxes

Fields	
All the fields are tabulated against the overall, open and invoiced prices.	
Extended Price	The total of quantity multiplied by unit price.
Option Price	The price of any additional options associated with the item ordered.
Discount	The discount price applied to the associated line. Click the hyperlink to view the Overall Pickup Request Charges, and Invoiced Pickup Request Charges.
Charges	The total charges applied to the associated line. Click the hyperlink to view the Overall Pickup Request Charges, and Invoiced Pickup Request Charges.
Tax	The total taxes applied to the order line. Click the hyperlink to view the , and Invoiced Pickup Request Taxes.
Totals	The total amount of the associated line after any charges and taxes have been applied.

Table 8–141   Options

Fields	
The Options table displays only when a pickup service has any optional services available, such as clean up or old appliance removal.	
Option ID	The option's ID
Description	The option's description.

Table 8–141   Options

Fields	
Quantity	The quantity of the option.
Price	The option's price.

Refer to the "Return From" table for more information about viewing the return shipping address details.

Table 8–142   Pickup Request Details Screen, Associated Order Lines

Action	
Remove Association	This action removes the association with the return line.
Fields	
Line Number	The pickup item's line number. Click this link to view the Return Line Detail screen.
Item ID	The return line item ID.
PC	The item classification such as first quality, second quality, or finished good. Orders are placed for a particular classification.
UOM	The return line item's unit of measure.
Description	The return line item's description.
Line Quantity	The quantity of the line item returned.
Total Amount	The return line item's total amount.
Status	The current status for that part of the return line.

8.88 Additional Product Lines

You can add additional product lines to an existing pickup service request.

Table 8–143   Pickup Request

Fields	
Return Number	The unique identifier of the return. Click this link to view the Return Detail screen.
Item ID	The pickup service item's ID.
Description	The description of the pickup service.
Appointment	The date and time of the pickup.
Line Number	The line number of the pickup service.
UOM	The units of measure in which the pickup service is calculated.
Return to Node	The node that performs the pickup.
Status	The status of the pickup request.
Line Quantity	The quantity used to measure the pickup service.

Table 8–144   Additional Product Lines Screen, Return Lines

Action	
Add To Pickup Request	This action lets you add the selected order lines to the pickup request. A modification reason window pops up to confirm the reason code.
Fields	
Line Number	The product line's line number.
Item ID	The product line's item ID.
UOM	The product line's unit of measure.
Description	The product line's description.

8.89 Pickup Request Instructions

You can add instructions to a pickup request in this screen. Pickup request instructions enable you to provide information to the personnel who are completing the specific pickup request at hand. You can add, modify, or delete pickup request instructions at any time before the pickup has been scheduled.

Refer to the Pickup Request table for more information about the pickup request header field descriptions.

Table 8–145   Instructions

Action	
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the ![icon] icon.

You can also use the Instructions window for:

- Adding an Instruction - Select the ![icon] icon to add the instruction lines and enter the relevant information in the fields as discussed in the Instructions table.

- Modify an Instruction - The information in the Instructions screen can be modified by entering the modified information and selecting `Save`.

Once the instructions are added, the ![icon] appears in the corresponding pickup request line in the Return Detail screen.

8.90 More Pickup Request Addresses

You can view more pickup request addresses in this screen. For more information about defining additional addresses, see the *Sterling Reverse Logistics: Configuration Guide*.

Refer to the Pickup Request table for more information about the pickup request header field descriptions.

8.91 Pickup Request Dates

You can view any custom dates that have been configured for monitoring pickup requests in this screen. For more information about monitoring, see the *Sterling Reverse Logistics: Configuration Guide.*

Refer to the Pickup Request table for more information about the pickup request header field descriptions.

Table 8–146   New Dates

Fields	Description
Date Type	The custom date type.
Requested	The date on which the date type is requested to be met.
Expected	The date on which the date type is expected to be met.
Actual	The date on which the date type actually needs to be met.

Enter the information and click Save to update the changes.

8.92 Overall Pickup Request Charges

You can view the header level charges of a pickup request in this screen.

The pickup request header panel descriptions can be referred from the Pickup Request table.

Overall Pickup Request Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category.
Charge Name	The name of the charge.
Charge Amount	The amount of charge applied at the header level.

You can use the Remaining Pickup Request Charges Detail window for adding or modifying the pickup request charges.

The pickup request header panel descriptions can be referred from the Pickup Request table.

- **Adding Remaining Pickup Request Charges** - From the Charges table, choose ➕ . A new row appears in the Charges table. From the Charge Category drop-down list, select the category of the new charge.

> **Note:** This drop-down displays all pickup request charges and discount charges. Consult your system administrator to determine which charges should be used as pickup request charges and which should be used as discount charges.

Remaining Pickup Request Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.
Charge Name	The name of the charge. Once you select the charge category, this field is populated with a drop-down list. Select the appropriate charge name.
Charge Amount	The amount of charge applied at the header level.

- **Modifying Remaining Pickup Request Charges** - Locate the charges you want to modify. In the charges panel, enter the amount

of the charges and click Save. The Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

8.93 Invoiced Pickup Request Charges

You can view the invoice level charges of a pickup request in this screen.

> **Note:** This window displays all pickup request charges and discount charges against the pickup request header.

The pickup request header panel descriptions can be referred from the Pickup Request table. If you view the invoiced pickup request charges screen from the Return Invoices screen the pickup request header panel is replaced with the fields described in the Invoices table.

Invoiced Pickup Request Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category.
Charge Name	The name of the charge.
Charge Amount	The amount of charge applied at the header level.

Overall Pickup Request Taxes - You can view the header level tax information associated with a pickup request.

The pickup request header panel descriptions can be referred from the Pickup Request table.

Overall Pickup Request Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax.
	Important: You must associate a pickup request header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a pickup request header level tax to a price value.

Fields	Description
Charge Name	The charge name associated with the tax.
	Important: You must associate a pickup request header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a pickup request header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied to the header level.

You can use the Remaining Pickup Request Taxes screen for adding or modifying the order taxes.

The pickup request header panel descriptions can be referred from the Pickup Request table.

- **Adding Remaining Pickup Request Taxes** - From the Taxes panel, choose ➕ . A new row appears in the Taxes panel. From the Charge Category drop-down list, select the category of the new charge and from Tax category, select a new tax name. Enter the relevant information as defined in the following table.

  Note: This drop-down displays all pickup request taxes and discount taxes. Consult your system administrator to determine which charges should be used as pickup request taxes and which should be used as discount taxes.

Remaining Pickup Request Taxes Screen, Taxes

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.

Fields	Description
Charge Name	The name of the charge. Once you select the charge category, this field is automatically populated with a drop-down list. Select the appropriate charge name from the list.
Charge Amount	The amount of charge applied at the header level.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied at the header level.

- **Modifying Remaining Pickup Request Taxes** - Locate the taxes you want to modify. In the taxes panel, enter the amount of the charges and click Save. The Modification Reason screen appears. Enter the appropriate reason code and text, and click OK.

8.94 Invoiced Pickup Request Taxes

You can view the invoice level tax information associated with an pickup request in this screen.

The pickup request header panel descriptions can be referred from the Pickup Request table. If you view the invoiced pickup request taxes screen from the Return Invoices screen, the pickup request header panel is replaced with the fields described in the Invoices table.

Invoiced Pickup Request Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax.
	Important: You must associate a pickup request header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a pickup request header level tax to a price value.

Fields	Description
Charge Name	The charge name associated with the tax.
	Important: You must associate a pickup request header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a pickup request header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied to the header level.

Return Service Request Search By All Attributes - You can search for service requests by all attributes in this screen.

Table 8–147   Return Service Request Search By All Attributes

Fields	
Document Type	The document type for the service request displays.
Enterprise	Choose this field and lookup option to find the specific enterprise you want to use, or choose Across Enterprises to search across all enterprises.
Return #	Enter the return number associated with the service requests for which you want to search, if applicable.
Buyer	Enter the Buyer associated with the service requests for which you want to search, if applicable.
Seller	Enter the Seller associated with the service requests for which you want to search, if applicable.
Item ID	Enter the item ID to search for orders containing a specific service item, if applicable.
Appointment	Enter the appointment date range through which you want to search for service requests, if applicable.

Table 8–147   Return Service Request Search By All Attributes

Fields	
Return Line Status	Select the status range of the service requests for which you want to search, if applicable.
Max Records	Enter the maximum number of service requests you want returned from your search.

The Service Request List screen displays as a result of this search.

8.95 Return Service Request Search By Draft Returns

Table 8–148   Return Service Request Search By Draft Returns

Fields	
Document Type	The document type for the service request displays.
Enterprise	Choose the field and lookup option to find the specific enterprise you want to use, or choose Across Enterprises to search across all enterprises.
Return #	Enter the return number associated with the service requests you want to search for, if applicable.
Buyer	Enter the Buyer associated with the service requests you want to search for, if applicable.
Seller	Enter the Seller associated with the service requests you want to search for, if applicable.
Buyer Account #	Enter the Buyer account number associated with the service requests for which you want to search, if applicable.
Max Records	Enter the maximum number of service requests you want returned from your search.

The Service Request List screen displays as a result of this search.

8.96 Service Request List

The Service Request List screen displays the results of a provided service search. You can perform actions on one or more requests by selecting the check boxes of the appropriate requests on which you want to perform an action by choosing the applicable action from the action bar.

Table 8–149   Service Request List

Actions	
View Details	This action takes you to the Service Request Details screen where you can view the details of the service requests and the associated order lines for the selected service requests.
View Instructions	This action takes you to the Service Request Instructions screen where you can enter instructions for the selected service requests.
More Addresses	This action takes you to the More Service Request Addresses screen where you can add, modify, or view additional addresses for the selected service requests.
Remove	This action removes only the selected draft service requests.
Fields	
Return #	The return number associated with the service request.
Line #	The line number of the service request in the return order. Click this link to view the Service Request Details screen.
Status	The status of the service request.
Enterprise	The enterprise associated with the return order.
Return Date	The date on which the return order was placed.
Total Amount	The total cost applicable to the service request.

8.97 Service Request Details

You can view the details of the selected service requests in this screen.

Table 8–150   Service Request Details Screen, Service Request

View Icons	
	View Work Order - This icon takes you to the Work Order Details screen where you can view the related work order associated with the service request.
	Instructions - This icon takes you to the Service Request Instructions screen where you can add or modify the instructions of the service request.
	More Addresses - This icon takes you to the More Service Request Addresses screen where you can add or modify addresses.
	Service Request Dates - This icon takes you to the Service Request Dates screen where you can view the requested, expected, and actual date type for the service request.
	Related Order Lines - This icon takes you to the Related Order Lines screen where, for example, you can view the sales order lines created from the Order Console.
Action	
Cancel	Select this action to cancel the service request. In the Modification Reason screen, enter the reason code and reason text for cancelling the service request.
Fields	
Return #	The unique identifier of the return order. Click this link to view the order details. For more information about viewing the order details, see the *Sterling Distributed Order Management: User Guide*.
Line #	The line number of the service.
Status	The status of the service request.
Item ID	The unique identifier of the service item.
UOM	The unit of measure in which the service is calculated.
Line Quantity	The quantity used to measure the service.
Description	The description of the service.
Document Type	The document type associated with the service request.

Table 8–150   Service Request Details Screen, Service Request

Appointment	The date and time of the service.
Return to Node	The node handling the return.

Table 8–151   Service Request Details Screen, Charges And Taxes

Fields	
All fields are tabulated for the overall, open, and invoiced prices.	
Extended Price	This is calculated as the total quantity times the unit price.
Option Price	The price of any additional option associated with the item ordered.
Fees	The fees applied to the associated line. Click the corresponding hyperlink to view the Overall Service Request Charges, , or Invoiced Service Request Charges.
Charges	The total charges applied to the associated line. Click the corresponding hyperlink to view the Overall Service Request Charges, , or Invoiced Service Request Charges.
Tax	The total taxes applied to the order line. Click the corresponding hyperlink to view the , , or Invoiced Service Request Taxes.
Totals	The total amount of the line after applying the charges and taxes.

Table 8–152   Service Request Details Screen, Options

Fields	
This Options table displays only when a provided service has optional services, such as clean up or old appliance removal.	
Option ID	The unique identifier of the option.
Description	The description of the option.
Price	The price of the option.

Table 8–153   Service Request Details Screen, Return From

You can view the details of the person or organization from where the product is being returned. For more information about viewing the return shipping address details, see Table 8–6.

Table 8–154   Service Request Details Screen, Associated Order Lines

Action	
View Details	This action takes you to the Order Line Detail screen where you can view the details of the selected associated order line. For more information about viewing the details of the associated order line, see the *Sterling Distributed Order Management: User Guide*.
Fields	
Line #	The line number of the return item. Click this link to view the Return Line Detail screen.
Item ID	The item identifier of the return line.
PC	The item classification such as first quality, second quality, or finished good. Orders are placed for a particular classification.
UOM	The unit of measure of the return line item.
Description	The description of the return line item.
Line Quantity	The line quantity of the item returned.
Total Amount	The total amount of the return line item.
Status	The current status of the return line.

8.98 Service Request Instructions

You can add instructions to a service request in this screen.

Table 8–155 Service Request Instructions Screen, Service Request

Fields	
Return #	The unique identifier of the return order. Click this link to view the order details. For more information about viewing the order details, see the *Sterling Distributed Order Management: User Guide*.
Line #	The line number of the service.
Status	The status of the service request.
Item ID	The item identifier of the service.
UOM	The unit of measure in which the service is calculated.
Line Quantity	The line quantity used to measure the service.
Description	The description of the service.
Appointment	The date and time of the appointment.
Return To Node	The node handling the return.

Table 8–156 Instructions

Action	
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the icon.

You can also use the Instructions window for:

• Adding an Instruction - Select the icon to add instruction lines and enter the relevant information in the fields as discussed in the Instructions table.

- Modifying an Instruction - The information in the Instructions screen can be modified by entering the modified information and clicking Save.

Once the instructions are added, displays in the corresponding Service Request line in the Return Detail screen.

8.99 More Service Request Addresses

You can view more service request addresses in this screen. For more information about defining additional address types, see the *Sterling Reverse Logistics: Configuration Guide*.

For more information about the service request header level field descriptions, see Table 8–155.

8.100 Service Request Dates

You can view any custom dates that are configured for monitoring service requests in this screen. For more information about monitoring service requests, see the *Sterling Reverse Logistics: Configuration Guide.*

For more information about the service request header level field descriptions, see Table 8–155.

Table 8–157   New Dates

Fields	Description
Date Type	The custom date type.
Requested	The date on which the date type is requested to be met.
Expected	The date on which the date type is expected to be met.
Actual	The date on which the date type actually needs to be met.

8.101 Overall Service Request Charges

You can view the header level charges of a service request in this screen.

For more information about the service request header level field descriptions, see Table 8–155.

Overall Service Request Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category.
Charge Name	The name of the charge.
Charge Amount	The amount of charge applied at the header level.

Remaining Service Request Charges - You can use the Remaining Service Request Charges screen to add or modify the service request charges.

For more information about the service request header level field descriptions, see Table 8–155.

Adding Remaining Service Request Charges

To add the remaining service request charges:

1. From the Charges table, choose ![plus icon] . A new row displays in the Charges table.

2. From the Charge Category drop-down list, select the category of the new charge.

> **Note:** The drop-down list displays all service request charges and discount charges. Consult your system administrator to determine which charges to use as service request taxes and fee taxes.

Remaining Service Request Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.

Fields	Description
Charge Name	The name of the charge. Once you select the charge category, this field is populated with a drop-down list. Select the appropriate charge name.
Charge Amount	The amount of charge applied at the header level.

After making changes to the Charges panel, click Save to update the remaining service request charges. The Modification Reason screen displays. Enter the appropriate reason code and text, and click OK.

Modifying Remaining Service Request Charges

To modify the remaining service request charges:

1. Search for the charges you want to modify.

2. In the Charges panel, enter the amount of the charges and click Save.

3. In the Modification Reason screen, enter the appropriate reason code and text, and click OK.

8.102 Invoiced Service Request Charges

You can view the invoice level charges of a service request in this screen.

> **Note:** This window displays all service request charges and discount charges against the service request header.

For more information about the service request header level field descriptions, see Table 8–155.

If you view the invoiced service request charges screen from the Return Invoices screen, the service request header panel is replaced with the fields described in Table 8–19.

Invoiced Service Request Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category.

Fields	Description
Charge Name	The name of the charge.
Charge Amount	The amount of charge applied at the header level.

Overall Service Request Taxes - You can view the header level tax information associated with a service request.

For more information about the service request header level field descriptions, see Table 8–155.

Overall Service Request Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax.
	Important: You must associate a service request header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a service request header level tax to a price value.
Charge Name	The charge name associated with the tax.
	Important: You must associate a service request header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a service request header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied at the header level.

Remaining Service Request Taxes - You can use the Remaining Service Request Taxes screen to add or modify the order taxes.

For more information about the service request header level field descriptions, see Table 8–155.

Adding Remaining Service Request Taxes
To add the remaining service request taxes:

1. From the Taxes panel, choose ➕ . A new row displays in the Taxes panel.

2. From the Charge Category drop-down list, select the category of the new charge.

3. From Tax Category, select a new tax name.

4. Enter information in the applicable fields. For the field value descriptions, see Table .

> **Note:** The drop-down list displays all service request taxes and discount taxes. Consult your system administrator to determine which charges to use as service request taxes and fee taxes.

Remaining Service Request Taxes Screen, Taxes

Fields	Description
Charge Category	The name of the charge category. Select the appropriate charge category from the drop-down list.
Charge Name	The name of the charge. Once you select the charge category, this field is automatically populated with a drop-down list. Select the appropriate charge name from the list.
Charge Amount	The amount of charge applied at the header level.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied at the header level.

After making changes in the Taxes panel, click Save to update the remaining service request taxes. In the Modification Reason screen, enter the appropriate reason code and text, and click OK.

Modifying Remaining Service Request Taxes

To modify the remaining service request taxes:

1. Search for the taxes you want to modify.

2. In the taxes panel, enter the amount of the charges and click Save.

3. In the Modification Reason screen that pops up enter the appropriate reason code and text and click OK.

8.103 Invoiced Service Request Taxes

You can view the invoice level tax information associated with a service request in this screen.

For more information about the service request header level field descriptions, see Table 8–155.

If you view the invoiced service request taxes screen from the Return Invoices screen, the service request header panel is replaced with the fields described in Table 8–19.

Invoiced Service Request Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category associated with the tax.
	Important: You must associate a service request header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a service request header level tax to a price value.
Charge Name	The charge name associated with the tax.
	Important: You must associate a service request header level tax with a charge. Otherwise, it is calculated as 0.
	Note: You cannot apply a service request header level tax to a price value.
Charge Amount	The charge amount that is taxed.
Tax Name	The name of the tax. For example, International Tax.
Tax Percentage	The percentage of tax applied to the header price.
Tax Amount	The amount of tax applied at the header level.

To view history return details:

1. From the navigation bar, select Reverse Logistics.

2. Choose the Return Console. The Return Search window appears.

3. Search for the applicable history return orders.

4. From the list, select the check boxes of the applicable history return orders.

5. From the action bar, choose View Details. The History Return Detail window appears.

> **Note:** All actions that result in the return modification or status change are not allowed for history returns. Modifications to a return are only allowed after restoring a history return. For more information about restoring a history return, refer to.

8.104 Organization Details

You can view an organization's details in this screen.

Table 8–158   Organization Details

Field	Description
Organization Information	
Organization Code	The code that identifies the organization.
Organization Name	The name of the organization.
DUNS Number	The unique nine-digit identification sequence which provides unique identifiers of single business entities. Selling and Fulfillment Foundation does not associate any logic with the DUNS number.
Account Number With Hub	If the organization is not the Hub, the account number that the organization has with the Hub.
Primary Enterprise	The primary enterprise of the organization.
Primary URL	Enter the URL of the organization's Internet address, if applicable.
Primary Contact Address	
This inner panel displays the current primary contact address for this organization. Click 🖳 to view the Primary Contact Address Details. For more information about the Primary Contact Address Details window, refer to Organization Address Details Screen.	

Table 8–158   Organization Details

Field	Description
Corporate Address	
This inner panel displays the current corporate address for this organization. Click 🖳 to view the Corporate Address Details. For more information about the Corporate Address Details window, see Organization Address Details Screen.	

8.105 Organization Address Details Screen

Table 8–159   Address Details

Fields	
First Name	The first name.
Middle Name	The middle name.
Last Name	The surname.
Company	The company.
Day Time Phone	The day time phone number.
Evening Phone	The evening phone number.
Mobile Phone	The mobile phone number.
Fax	The fax number.
E-Mail	The e-mail address.
Address Line 1	The first address line.
Address Line 2	The second address line, if applicable.
Address Line 3	The third address line, if applicable.
Address Line 4	The fourth address line, if applicable.
Address Line 5	The fifth address line, if applicable.
Address Line 6	The sixth address line, if applicable.
City	The city.
State	The state.
Postal Code	The postal code.
Country	The country.

Enter the relevant information and click Save to update the changes. The return modification reason window pops up. Enter the reason code and text and click OK.

8.106 Return Modification Reason

When you modify any information in the return console screen and click Save, the return modification reason window pops open for you to select the reason code and enter a reason text. The reason code is specified in the modification reasons tree in Reverse Logistics node of the Applications Manager. For more information about specifying the reason codes, see the *Sterling Reverse Logistics: Configuration Guide*.

Table 8–160   Return Modification Reason

Fields	
Reason Code	Select the reason code for the modification. The reason code can be specified in the Applications Manager. For more information, refer to the *Sterling Reverse Logistics: Configuration Guide*.
Reason Text	Enter the reason text for the modification.

8.107 Modification Reason

When you modify any information in the return console screen and click Save, the return modification reason window pops open for you to select the reason code and enter a reason text. The reason code is specified in the modification reasons tree in Reverse Logistics node of the Applications Manager. For more information about specifying the reason codes, see the *Sterling Reverse Logistics: Configuration Guide*.

Table 8–161   Return Modification Reason

Fields	
Reason Code	Select the reason code for the modification. The reason code can be specified in the Applications Manager. For more information, see the *Sterling Reverse Logistics: Configuration Guide*.
Reason Text	Enter the reason text for the modification.

8.108 Questions

The address or permit questions and answer options displayed on this screen are configured. For more information about configuring questions and answer options, refer to the *Sterling Distributed Order Management: Configuration Guide*.

Once you have selected or entered your necessary answers, click Save.

8.109 Modify Return From Address

You can modify the ship to address in this screen.

Table 8–162   Modify Return From Address

Fields	
Address Line 1	The return from address line 1.
Address Line 2	The return from address line 2.
Address Line 3	The return from address line 3.
Address Line 4	The return from address line 4.
Address Line 5	The return from address line 5.
Address Line 6	The return from address line 6.
City	The city.
State	The state to which the city belongs to.
Postal Code	The postal code of the city.
Country	The country.
First Name	The vendor's first name.
Middle Name	The vendor's middle name.
Last Name	The vendor's last name.
Company	The company name of the vendor.
Day Time Phone	The vendor's day time phone number.
Evening Phone	The vendor's evening time phone number.
Mobile Phone	The vendor's mobile number.
Fax	The fax number.

Table 8–162   Modify Return From Address

E-mail	The vendor's e-mail address.
Additional Address and / or Permit Questions have been answered for this address.	This field is shown when additional address and/or permit questions have been answered for this address. Selecting the Retain Existing Answers radio button saves the answers for this address. Selecting Clear Answers clears all answers for this address.

Click Save to update any modifications in the screen.

9

Create Return Order Screens

The Create Return Console enables a user to manually enter a blind return. A blind return occurs when items are returned without any advanced notification, such as a Return Merchandise Authorization (RMA).

9.1 Return Entry

Table 9–1   Return Entry Screen

Fields	
Document Type	The document type associated with the return.
Enterprise	Select the Enterprise that is to handle the order.
Buyer	Enter the Buyer returning the order.
Seller	Enter the Seller that the order is being returned to.
Return #	Enter the return number.
Return Date	Enter the date the return is placed.
Return Type	This field can be customized as needed.
Currency	Select the currency with which any refunds are to be handled in.
Return Against Order	"No" indicates that the return is not derived from an order; it is a blind return.
Return To Node	Enter the node the return is sent to.
Return By Gift Recipient	Check this if items are being returned by the gift recipient of the original order.

The `Create Return` action creates a return order in the `Draft` status. Changes can be made to a return at any time while it is in Draft status. A Draft return does not enter Created status until it is confirmed.

> **Important:** If you try to add an item that is configured as non-returnable, a warning is displayed. However, the system does let you create a return for a non-returnable item.

9.2 Returnable Order Lines

If a return must be created for an order that was shipped through Selling and Fulfillment Foundation, you can create a return against the order through the Order Console. For returns on inbound orders shipped through Selling and Fulfillment Foundation, use the Inbound Order Console.

To create a return against an order:

1. From the navigation bar, select Order for orders or Supply for inbound orders.

2. Choose Order Console for orders or Inbound Order Console for inbound orders. The search window appears.

3. Search for the applicable orders.

4. From the list, select the check boxes of the applicable orders. purchase orders. returns.

5. From the action bar, choose Create Return. The Returnable Order Lines window appears.

Table 9–2   Returnable Order Lines Screen, Return

Fields	
Document Type	The document type associated with the return.
Enterprise	The Enterprise that is to handle the order.
Buyer	The Buyer returning the order.
Seller	The Seller that the order is being returned to.
Return #	Enter the return number.

Table 9–2   Returnable Order Lines Screen, Return

Fields	
Return Date	Enter the date the return is placed.
Return Type	This field can be customized as needed.
Currency	The currency with which any refunds are to be handled in.
Return Against Order	`Yes` indicates that the return is derived from an order.
Return To Node	Enter the node the return is sent to.
Return By Gift Recipient	Check this if items are being returned by the gift recipient of the original order.

Table 9–3   Returnable Order Lines Screen, Returnable Order Lines

Fields	
Line	The return line number being authorized.
Item ID	The the item ID of the return item being authorized.
PC	The return item's product class.
UOM	The return item's unit of measure.
Description	The return item's description.
Tag #	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the inventory batch number the return line belongs to, click the hypertext link.
Ship By Date	The date the return item should be shipped by.
Available To Return	The quantity of the return item available to be returned.
Return Qty	Enter the quantity of the item being returned in the return line.
Line Type	From the drop-down, select the line type.
Reason Code	From the drop-down, select the reason for the item being returned.
Return To Node	Enter the node handling the return line.

10

Create Return Shipment Screens

The Create Return Shipment entry console is used to manually create shipments from fax, email or telephone conversations or when a trailer arrives with no prior notice.

10.1 Return Shipment Entry

You can create return shipments with supervisory overrides in this screen.

Table 10–1   Return Shipment Entry

Action	
Supervisory Overrides	This action takes you to the Shipment Supervisory Overrides screen where you can specify the shipment overrides.
Fields	
Document Type	Select the document type associated with the shipment you are creating for.
	Valid value is 'Return Order'.
Receiving Node	Select node where the receipt is being performed.
	This is automatically defaulted by the system based on the user profile.
Enterprise	Select the enterprise associated with the shipment you are creating for, if applicable.
Shipment #	Enter the shipment number for the shipment you are creating, if applicable. A unique number is automatically generated by the system, if number is not specified.

Table 10–1   Return Shipment Entry

Return From Node	Enter the return node associated with the shipment.
Buyer	Enter the buyer associated with the shipment you want to create, if applicable.
Seller	Enter the seller associated with the shipment you want to create.
Return #	Enter the return number.
Release#	Enter the release number of the order against which the shipment is being created, if applicable.
Pro#	Enter the PRO number assigned by the carrier to track the shipment you are creating, if applicable.
Service	Select the carrier service availed for transporting the shipment, if applicable.
BOL#	Enter the bill of lading number of the shipment you are creating, if applicable.
Trailer#	Enter the trailer number of the shipment you are creating, if applicable.

After entering the necessary details select `Create Shipment` to create the shipment and you are taken to the Return Shipment Details screen.

10.2 Shipment Supervisory Overrides

In this screen you can check the shipment overrides.

Table 10–2   Shipment Supervisory Overrides

Fields	
Override Shipment Entry	Select this to allow shipment entry.
Do not verify Pallet Content	Select this to skip pallet content verification for this shipment.
Do not verify Case Content	Select this to skip case content verification for this shipment.

Table 10–2   Shipment Supervisory Overrides

Fields	
Allow Overage	Select this to allow overage for this shipment.
Order not Available on System	Select this to verify the order is not available on the system for this shipment.

11

Return Shipment Console Screens

The Return Shipment Console provides access to information about returned shipments and returned containers.

11.1 Return Shipment Search By Status

You can search for return shipments by their status with the help of this screen.

> **Note:** Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 11–1   Return Shipment Search by Status

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Select the enterprise you are searching for.
Across Enterprises	Select this option if you are searching across all enterprises.
Shipment #	Enter the shipment number to search for, if applicable.
Return #	Enter the return number you are searching for, if applicable.
Plan #	Enter the plan number the return shipment you are searching for belongs to, if applicable.

Table 11–1   Return Shipment Search by Status

Fields	
Origin Node	Enter the origin node you want to search for return shipments under, if applicable.
Destination Node	Enter the destination node you want to search for return shipments under, if applicable.
Status	Select the status range of the return shipments you want to search for, if applicable.
Closed Shipments Only	Select this if you only want to search for return shipments that have been closed, if applicable.
Held Shipments With Hold Type	Check this box if you want to search for return shipments that are held.
Max Records	Enter the maximum number of returns you want returned from your search.

Enter the relevant information and click Search. The Return Shipment List screen is displayed.

11.2 Return Shipment Search By Date

You can search for return shipments by their shipment dates with the help of this screen.

> **Note:**   Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 11–2   Return Shipment Search by Date

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Select the enterprise you are searching for.
Across Enterprises	Select this option if you are searching across all enterprises.

Table 11–2   Return Shipment Search by Date

Fields	
Shipment #	Enter the return shipment's number you want to search for, if applicable.
Return #	Enter the draft return number you are searching for, if applicable.
Expected Ship Date	Enter the expected ship date range you want to search for returns through, if applicable.
Expected Delivery Date	Enter the expected delivery date range you want to search for returns through, if applicable.
Actual Ship Date	Enter the actual ship date range you want to search for returns through, if applicable.
Actual Delivery Date	Enter the actual delivery date you want to search for returns through, if applicable.
Max Records	Enter the maximum number of draft returns you want returned from your search.

Enter the relevant information and click Search. The Return Shipment List screen is displayed.

11.3 Return Shipment Search By Item

You can search for return shipments by the shipment items with the help of this screen.

> **Note:**   Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 11–3   Return Shipment Search by Item

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Select the enterprise you are searching for.

Table 11–3   Return Shipment Search by Item

Fields	
Across Enterprises	Select this option if you are searching across all enterprises.
Shipment #	Enter the return shipment's number you want to search for, if applicable.
Item ID	Enter the item's ID you want to search for, if applicable.
Buyer	Enter the Buyer's ID you want to search for, if applicable.
Seller	Enter the Seller's ID you want to search for, if applicable.
Max Records	Enter the maximum number of returns you want returned from your search.

Enter the relevant information and click Search. The Return Shipment List screen is displayed.

11.4 Return Shipment List

The return shipment list displays the results of a return search. You can perform actions on a single return or multiple returns by selecting the check boxes of the returns you want to perform an action on and choosing the applicable action from the action bar.

Table 11–4   Return Shipment List

Actions	
View Details	This action takes you to the Return Shipment Details screen for selected shipments. In this screen, you can view the container details, start and record receipts.
Delete Shipment	Click this action if you want to delete the selected shipments. Upon clicking, an alert screen is displayed to confirm the deletion.
Start Receipt	This action takes you to the Start Receipt screen where you can enter the necessary information required for creating a receipt.

Table 11–4   Return Shipment List

Receive	This action takes you the Receive Details screen. For more information about this screen, see the *Sterling Warehouse Management System: User Guide*.
Report/Record Receipt	This action takes you to the Receive screen where you can report or record the receipt.
View Holds	This action takes you to the View Holds screen where you can view the holds applied to the return shipment.
Fields	
Shipment #	The return shipment's number.
Status	The current status of the return shipment.
Expected Ship Date	The return shipment's expected ship date.
Actual Ship Date	The return shipment's actual ship date.
Expected Delivery Date	The return shipment's expected delivery date.
Actual Delivery Date	The return shipment's actual delivery date.
Origin	The return shipment's origin.
Destination	The return shipment's destination.
Mode	The return shipment's mode.

11.5 Return Shipment Details

Table 11–5   Return Shipment Details, Shipment

View Icons	
	Loads - This action takes you to the Shipment Loads screen where you can view the loads associated with this shipment.
	Containers - This action takes you to the Shipment Containers list screen where you can perform certain actions for viewing the details of the containers or delete the container.
	Instructions - This icon lets you view the Shipment Instructions screen where you can add, modify or delete the instructions for the return shipments.

Table 11–5   Return Shipment Details, Shipment

📖	**Shipment Audits** - This icon takes you to the Shipment Audits screen where you can view the list of audits performed on the shipments.
🚚	**Shipment Dates** - This icon takes you to the Shipment Dates screen to view the requested, expected and actual date type for the given shipments.
🔔	**Alerts** - This icon takes you to the Shipment Alerts screen where you can view the alerts for the order.
📋	**Receipts** - This icon takes you to the Return Receipt List screen where you can view the related receipts for this shipment and perform associated actions.
🗒	**Additional Attributes** - This icon takes you to the Return Receipt List screen where you can specify additional attributes for Identification, Shipping and Financials.
🏃	This icon takes you to the Shipment Activity Demand screen which displays the activity demand details for the selected shipment.
Actions	
Confirm Shipment	This action lets you confirm the shipments.
Record Container Details	This action takes you to the Pack Container screen where you can enter details about the unpacked container items. For more information, refer to the *Sterling Warehouse Management System: User Guide*.
Start Receipt	This action takes you to the Start Receipt screen where you can enter details on starting a receipt for receiving the returns.
Receive	This action takes you to the Receive details screen. For more information, refer to the *Sterling Warehouse Management System: User Guide*.
Report/Record Receipt	This action takes you to the Receive screen where you can report or record a receipt for the return shipments.
View Holds	This action takes you to the View Holds screen where you can view the holds applied to the return shipment.
Fields	

Table 11–5   Return Shipment Details, Shipment

Shipment #	The return shipment number.
Shipper's Ref. #	The return shipment reference number.
Plan #	The delivery plan number the return shipment is associated with, if applicable.
Enterprise	The enterprise associated with the return shipment.
Buyer	The buyer's ID.
Seller	The seller's ID.
Return From Node	The return from node.
Return To Node	The return to node.
Status	The return shipment status. Click the ⛟ icon to go to the View Holds screen where you can view holds that are applied to the load.
Has Hazardous Items	Indicates if the shipment contains any hazardous item.

Table 11–6   Return To

View Icon	
🖼️	**Address Details** - Choose this icon to view or modify the Return To addresses. For more information about the screen that is displayed, refer to Organization Address Details Screen.
The name and address of the person or organization where the order is to be returned.	

Table 11–7   Return From

View Icon	
🖼️	**Address Details** - Choose this icon to view or modify the Return From addresses. For more information about the screen that is displayed, refer to Organization Address Details Screen.
The name and address of the person or organization from where the product is being returned.	

Table 11–8   Return Shipment Details Screen, Total

Fields	
Weight	The total weight of the return shipment. This field can be modified.
Volume	The total volume of the return shipment. This field can be modified.
No. of Containers	The number of packed containers in a return shipment.

The following table is displayed if the return is associated with a shipment carrier.

Table 11–9   Return Shipment Details Screen, Carrier Info

Fields	
Delivery Method	The delivery method "Shipping" indicates this return is shipped by the carrier.
Ship Mode	The mode of return shipment. For example, truckload, less-than truckload, and parcel.
Service	The carrier service used to ship the return shipment. This field can be modified.
Trailer #	The trailer number.
BOL #	The bill of lading number.
Seal #	The seal number.
PRO #	The PRO number.
Routing Source	Indicates if routing was pre-assigned by the system or specified through an external system.
Load #	The return shipment's load number.
Routing Error Code	The routing error code is automatically displayed by the system, if applicable.

Table 11–9   Return Shipment Details Screen, Carrier Info

Fields	
Requested Carrier Service	The requested carrier service for the return shipment.
Airway Bill #	Indicates the airway bill number for tracking the shipment. The airway bill is a document of carriage which is issued by airlines to shippers of cargo. The airway bill number: • Is an evidence of a contract of carriage. • Proves receipt of goods for shipment. • Is a freight bill.

The following table is displayed if the return is associated with a delivery carrier. From this table you can also confirm a return delivery request appointment.

Table 11–10   Return Shipment Details Screen, Carrier Info (Delivery)

Fields	
Delivery Method	The delivery method "DEL" indicates this return is delivered by the carrier.
Associated Delivery Request	The line on return associated with the return delivery request.
Item ID	The item ID of the return delivery service item.
Description	The description of the return delivery service item.
Appointment	The appointment scheduled for the delivery.

Table 11–11   Return Shipment Details Screen, Charges

Fields	
Carrier Account #	The account number of the carrier which is to be charged.
Freight Terms	The freight terms associated with this carrier.
COD Payment Method	Select the COD payment type for the carrier.
Estimated Shipment Charges	The estimated charge for shipping the return shipment.

Table 11−11   Return Shipment Details Screen, Charges

Fields	
Actual Shipment Charges	The actual charge for shipping the return shipment.
Freight Charge	The charge applied by the Carrier for shipping the return shipment.

Table 11−12   Return Shipment Details Screen, Shipment Lines

Actions	
View Details	This action takes you to the line screen where you can view the details of the shipment line.
Add Release	Click this option to add releases for the selected shipments. The Return Release Search By Status screen appears. Enter the relevant search details and click Search. The Return Release List screen is displayed. Select the releases and click Add to Shipment.
Remove Line	This action removes the selected shipment lines.
Fields	
Shipment Line #	The return shipment line number. Click this link to go to the Shipment Line Details screen where you can view the shipment line attributes for the selected shipment line number.
Return #	Enter the return number.
Line #	Enter the return shipment line number.
Release #	Enter the order release number to which the return shipment line belongs.
Item ID	Enter the return item ID.
Description	A brief description of the item.
PC	Select the item's product class.
UOM	Select the item's unit of measure.
Requested Serial #	The requested serial number for the order. Editable if the order is not available on the system.

Table 11–12   Return Shipment Details Screen, Shipment Lines

Mark For	The mark for address associated with the item.
Quantity	Enter the shipment line's expected quantity. If the Receipt is made against an order, Quantity is displayed as 0.
Shortage Quantity	Indicates the shortage quantity received for the item in this shipment.
Received Quantity	Indicates the quantity received for the item in this shipment. If the receipt is against an order, it indicates the quantity received for the order.

11.6 Shipment Loads

You can view the return shipment loads in this screen.

Table 11–13   Shipment

Fields	
Shipment #	The return shipment number.
Shipper's Ref. #	The return shipment reference number.
Plan #	The delivery plan number the return shipment is associated with, if applicable.
Enterprise	The Enterprise associated with the shipment.
Buyer	The Buyer's ID.
Seller	The Seller's ID.
Ship Node	The node from where the receipt ships. Click this link to go to the "Ship Node Detail" screen to view the node details for the shipment. For more information about this screen, refer to the *Sterling Distributed Order Management: User Guide*.
Destination	The return order's shipment destination.
Status	The return shipment status.
Order #	The order number associated with the return order shipment.

Table 11–14   Return Shipment Loads Screen, Loads

Field	
Load #	The load number the return shipment belongs to.
Load Type	The load type as per your business practices.
Carrier/Service	The Carrier and Carrier service transporting the load.
Origin	The load's origin location.
Destination	The load's destination location.
Status	The load status.

11.7 Shipment Containers

Refer to Shipment table for field descriptions of the shipment header panel seen in this screen.

Table 11–15   Return Shipment Containers Screen, Containers.

Fields	
Container #	The container number.
Tracking #	The container's tracking number used to track the status and location of the container.
Container SCM	The shipment container marking.
Net Weight	The container's content's weight.
Net Weight UOM	The net weight unit of measure associated with the shipment.
Gross Weight	The weight of the container plus its contents.
Gross Weight UOM	The gross weight unit of measure.
Freight Charge	The charge applied by the Carrier for shipping the container.
Received	Indicates whether the shipment was received or not.

11.8 Shipment Instructions

You can specify instructions on the shipments in this screen.

Refer to Shipment table for field descriptions of the shipment header panel seen in this screen.

Table 11–16   Instructions

Action	
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the 🌐 icon.

You can also use the Instructions window for:

- Adding an Instruction - Select the ➕ icon to add the instruction lines and enter the relevant information in the fields as discussed in the Shipment Instructions table.

- Modify an Instruction - The information in the Shipment Instructions screen can be modified by entering the modified information and selecting Save.

11.9 Shipment Audits

You can view the shipment audits associated with a return in this screen.

Table 11–17   Shipment Audits, Shipment

Fields	
Shipment #	The receipt's shipment number.
Shipper's Ref. #	The receipt's shipment reference number.

Table 11–17   Shipment Audits, Shipment

Fields	
Plan #	The delivery plan number with which the return shipment is associated, if applicable.
Enterprise	The Enterprise associated with the receipt.
Buyer	The Buyer's ID. Click this link to go to the Organization Details screen where you can view the buyer organization details.
Seller	The Seller's ID. Click this link to go to the Organization Details screen where you can view the seller organization details.
Ship Node	The node from where the receipt ships. Click this link to go to the "Ship Node Detail" screen to view the node details for the shipment. For more information about this screen, refer to the *Sterling Distributed Order Management: User Guide*.
Receiving Node	The node that is receiving the receipt.
Status	The return shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment status audits.
Has Hazardous Item	Indicates if the receipt has any hazardous item.

Table 11–18   Shipment Audits, Shipment Audits

Fields	
Date	The date and time on which the shipment was modified associated with the receipt.
Modified By	The user who performed the modification.
Context	The modifications carried out against the return shipment.
Modification	The attribute that was modified for the return shipment.
Old Value	The attribute value before making the modifications.
New Value	The attribute value after it was modified.

Table 11–18   Shipment Audits, Shipment Audits

Fields	
Reason Code	The reason for the modification.
Reason Text	Additional information as to why the modification was made.

Table 11–19   Shipment, Shipment Line Audits

Fields	
Date	The date and time on which the return shipment line was modified.
Modified By	The user who performed the modification.
Context	The modifications carried out against the return shipment line.
Line #	The return shipment line number that was modified.
Modification	The attribute that was modified for the return shipment line.
Old Value	The attribute value before making the modifications.
New Value	The attribute value after it was modified.
Reason Code	The reason for the modification.
Reason Text	Additional information as to why the modification was made.

11.10 Shipment Status Audits

You can view the audits for the changes in the shipment status with the help of this screen.

Table 11–20   Shipment Status Audits, Shipment

Fields	Description
Shipment #	The receipt's shipment number.
Shipper's Ref. #	The receipt's shipment reference number.

Table 11–20   Shipment Status Audits, Shipment

Fields	Description
Plan #	The delivery plan number with which the return shipment is associated, if applicable.
Enterprise	The Enterprise associated with the receipt.
Buyer	The Buyer's ID. Click this link to go to the Organization Details screen where you can view the buyer organization details.
Seller	The Seller's ID. Click this link to go to the Organization Details screen where you can view the seller organization details.
Ship Node	The node from where the receipt ships. The node from where the receipt ships. Click this link to go to the "Ship Node Detail" screen to view the node details for the shipment. For more information about this screen, refer to the *Sterling Distributed Order Management: User Guide*.
Receiving Node	The node that is receiving the receipt.
Status	The return shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment status audits.
Has Hazardous Item	Indicates if the receipt has any hazardous item.

Table 11–21   Shipment Status Audits

Fields	
Modified By	The user who performed the modification.
Old Status	The return shipment status before the status modification.
Old Status Date	The date the return shipment entered the old status.
New Status	The return shipment status after the status modification.
New Status Date	The date and time of the status modification.
Reason Code	The reason for the modification.
Reason Text	Additional information for the reason for modification.

11.11 Shipment Dates

You can specify system dates and new dates for the shipment in this screen.

Refer to Shipment table for field descriptions of the shipment header panel seen in this screen.

The system dates table displays date-related information applicable either to shipments or deliveries. It does not display both shipments and deliveries together.

Table 11–22   Shipment Dates Screen, System Dates

Fields	
Requested Shipment Date	The requested shipment date associated with the shipment.
Expected Shipment Date or Optimized Appt From Date	For shipments, Expected Shipment Date displays the expected shipment date. For deliveries, Optimized Appt From Date displays the optimized date.
Actual Shipment Date	The actual shipment date associated with the shipment.
Requested Delivery Date	The requested shipment date associated with the shipment.
Expected Delivery Date or Optimized Appt To Date	For shipments, Expected Delivery Date displays the expected delivery date. For deliveries, Optimized Appt To Date displays the optimized date.
Actual Delivery Date	The actual delivery date associated with the shipment.

Table 11–23   Shipment Dates Screen, New Dates

Fields	
Date Type	The date type. For example, Shipment or Delivery.
Requested	The Buyer requested date for the date type. This field can be modified.
Expected	The expected date for the date type. This field can be modified.
Actual	The actual date for the date type. This field can be modified.

Enter the new information and click `Save` to update the changes made in this screen.

11.12 Shipment Alerts

You can view the alerts associated with the return shipments in this screen.

Refer to Shipment table for field descriptions of the shipment header panel seen in this screen.

Table 11–24   Shipment Alerts Screen, Alert List

Action	
View Details	This action lets you view the details of the alerts that were raised. For more information about this screen, see the *Selling and Fulfillment Foundation: Application Platform User Guide*.
Fields	
Alert ID	The alert ID. Click this link to view the alert details.
Type	The type of alert raised. For example, ON_FAILURE or FAILED_AUTH. For more information about types of alerts, see the *Selling and Fulfillment Foundation: Application Platform User Guide*.
Description	A brief description of the alert.
Queue	The queue the alert has been assigned to.
Priority	The alert priority.
Owner	The user who is handling the alert.
Raised On	The date the alert was raised.

11.13 Return Receipt List

This screen lets you view the return receipts

Table 11–25   Return Release List

Actions	
View Summary	This action takes you to the Return Order Receipt Summary screen to view the summary of the selected return receipts.
View Details	This action takes you to the Return Receipt Details screen where you can view the details of the selected return receipts.
Close Prereceipt	This action closes the prereceipts of the selected return receipts.
Receive	This action takes you to the Receive Details screen. For more information about this screen, see the *Sterling Warehouse Management System: User Guide*.
Close Receipt	This action closes the receipt for the selected returns.
Fields	
Receipt #	The receipt number.
Shipment #	The shipment number associated with the receipt.
Return #	The return number associated with the receipt.
Enterprise	The Enterprise associated with the receipt.
Buyer	The Buyer associated with the receipt.
Seller	The Seller associated with the receipt.
Receipt Start Date	The receipt start date.
Receiving Node	The receiving node associated with the node.
Receipt Open	Indicates whether or not the receipt is open or closed.
Receipt Status	The receipt status.

11.14 Additional Attributes

You can view the additional attributes associated with a return shipment.

Refer to the Shipment table for field descriptions of the shipment header panel seen in this screen.

Table 11–26   Additional Attributes Screen

Fields	
Overage Allowed	Indicates whether or not additional quantity can be received against the expected return shipment quantity.
Manually Entered	Indicates if the return shipment was created manually or automatically generated from an order.
Order Available On System	Indicates if the order the return shipment is associated with exists in the system.
Case Content Verification Required	Indicates if the contents of cases must be verified at the time of receipt.
Pallet Content Verification Not Required	Indicates if the contents of pallets must be verified at the time of receipt.
Shipment Entry Overridden	Indicates if information input at the time of shipment entry has been overridden.

11.15 Shipment Activity Demand

This screen provides shipment's activity demand details.

Refer to the Shipment table for field descriptions of the shipment header panel seen in this screen.

Table 11–27   Shipment Activity Demand, Product Demand

Fields	
Location ID	The item location in the node.
Activity Code	The activity to be performed on items belonging to the work order.
Item ID	A brief description of the item.
PC	The item's product class.
UOM	The item's unit of measure.
Priority	The priority of the demand.
Demand Quantity	The current demand for the item.

Table 11–27   Shipment Activity Demand, Product Demand

Satisfied Quantity	The extent to which the demand is satisfied.
Demand Satisfied	Indicates whether the demand is satisfied or not.

Table 11–28   Shipment Activity Demand, Container Demand

Fields	
Location ID	The item location in the node.
Activity Code	The activity to be performed on items belonging to the work order.
Pallet ID	The pallet LPN that belong to the work order.
Case ID	The case LPN that belong to the work order.
Priority	The priority of the demand.
Demand Satisfied	Indicates whether the demand is satisfied or not.

11.16 Return Container Search By All Attributes

You can use the Return Container Search window to perform a return container search by all attributes.

> **Note:**   Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 11–29   Return Container Search by All Attributes

Field	
Document Type	The document type is automatically displayed.
Return #	Enter the return number you are searching for, if applicable.
Shipment #	Enter the return number you are searching for, if applicable.
Container #	Enter the container number you are searching for, if applicable.

Table 11–29   Return Container Search by All Attributes

Field	
Container Type	Enter the type of containers you are searching for, if applicable.
Tracking #	Enter the tracking number you want to search for containers under, if applicable.
Item ID	Enter the item ID included in the containers you are searching for, if applicable.
Container SCM	Enter the container SCM you are searching for, if applicable.
Containers With Logical Kits Only	Select the check box to search for containers only with logical kits, if applicable.
Max Records	Enter the maximum number of returns you want returned from your search.

Enter the relevant information and click Search. The Return Container List screen is displayed.

11.17 Return Container List

The Return Container List window displays the results of a return search. You can perform actions on a single return or multiple returns by selecting the check boxes of the returns you want to perform an action on and choosing the applicable action from the action bar.

Table 11–30   Return Container List

Actions	
View Details	This action takes you to the Container Details screen where you can view the details of the shipment container and perform some activities.
Pack/Unpack	This action lets you pack or unpack the container. But the node must be a WMS ship node. For more information, refer to the *Sterling Warehouse Management System: User Guide*.
Print	This action takes you to the Print screen where you can enter the printer name and specify the number of copies required.

Table 11–30   Return Container List

Delete	This action takes you to the Delete Selected Containers Screen where you can specify options before deleting the container.
Fields	
Container #	The return container's container number.
Shipment #	The return container's shipment number.
Status	The current status of the return container's shipment
Manifested	Indicates whether or not a this return container is included on a shipment manifest.
Container Type	The return container's container type.
Tracking #	The return container's tracking number.
Container SCM	The unique shipping container marking that identifies the shipper of this return container.
Ship Date	The return container's ship date.

You can perform any of the actions described above for selected containers.

11.18 Container Details

Table 11–31   Container Details

View Icon	
📖	**Status Audits** - This icon takes you to the Shipment Status Audits screen where you can view the list of audits performed for the shipment containers.
Actions	
Print	This action takes you to the Print screen where you can enter the printer name and specify the number of copies required.
Void Tracking #	Click this action if you want to void the tracking number. An alert screen is displayed to confirm the deletion.
Fields	

Table 11—31   Container Details

Container ID	The container ID.
Container #	The container number.
Shipment #	The shipment to which the container belongs.
Container Type	The type of container used. For example, Carton or Pallet.
Ship Date	The date the container must ship by.
Container Group	The group belonging to the container.

Table 11—32   Container Details Screen, Container Info

Fields	
Carrier/Service	The Carrier and Carrier service shipping the container.
Tracking #	The container's tracking number used to track the container's status and location.
Pallet/Carton SCM	The shipment container marking number of the pallet or carton.
Declared Value	The value used to calculate customs charges. This field is only applicable to international shipments.
Weight	The weight of the container.
Height	The height of the container.
Length	The length of the container.
Width	The width of the container.

Table 11—33   Container Details Screen, Container Line Details

Fields	
Tag Details	This column displays only if the item is tag-controlled. The column label that displays is the name of the unique identifier you have defined (for example, Lot #). If you have defined more than one unique identifier, the label that displays is Tag #. To view the details associated with the unpacked items, click the hypertext link.
Order #	The order number to which the line item packaged in the container belongs.
Line #	The container line number and the order line number of the line item packaged in the container.
Release #	The order release number to which the line item packaged in the container belongs.
Item ID	The item ID of the line item packaged in the container.
PC	The product class of the line item packaged in the container.
UOM	The unit of measure of the line item packaged in the container.
Ship By Date	The date the container line must be shipped by.
Quantity	The quantity of the line item packaged in the container.

11.19 Print

You can print the label to apply to the container for a return shipment.

Table 11—34   Print

Fields	
Print Service Name	Select the print service name such as PrintShippingLabel.
Printer Name	Select the printer name.
No. of Copies	Enter the number of copies you want to print.

Enter the relevant information and click OK to print the labels.

11.20 Return Container Status Audits

You can view any status modifications performed against a return container.

To view return container's status audits:

1. From the navigation bar, choose Reverse Logistics.

2. Choose Return Shipment. The Return Shipment Search window appears.

3. Search for the applicable return containers.

4. From the return container list, select the check boxes of the applicable containers.

5. From the action bar, choose View Details. The Container Details window appears.

6. From the Container action bar, choose . The Container Status Audits window appears. For more information, see the *Sterling Logistics Management: User Guide*.

11.21 Return Container Serial Details

To view return container's serial details:

1. From the navigation bar, choose Reverse Logistics.

2. Choose Return Shipment. The Return Shipment Search window appears.

3. Search for the applicable return containers.

4. From the return container list, select the check boxes of the applicable containers.

5. From the action bar, choose View Details. The Container Details window appears.

6. In Container Line Details panel, click on the plus sign (+) to expand the Tag Details field. The tag control information that pertains to this container displays.

7. Click on the Serial# link. The Serial Details window appears. For more information, see the *Sterling Logistics Management: User Guide*.

11.22 Charges

Refer to Shipment for field descriptions of the shipment header panel seen in this screen.

Table 11–35   Charges Screen, Shipment Charges

Fields	
Charge Category/Charge Name	The category or name of the charge. For example, Gift Card.
Estimated Charge	The estimated charge for shipping the return shipment.
Actual Charge	The actual charge for shipping the return shipment.

Table 11–36   Charges Screen, Container Charges

Fields	
Container #	The return container's container number.
Actual Freight Charge	The Carrier's freight charge for shipping the container.

- **Adding a Return Shipment Charge** - From the Shipment Charges table, choose ✚ . Enter the appropriate fields and click Save.

- **Modifying a Return Shipment Charge** - From the Shipment Charges table, locate the charge you want to modify. In Estimated Charge, enter the estimated charge for the shipment. In Actual Charge, enter the actual charge for the return shipment and choose Save.

11.23 Shipment Line Details

You can view the shipment line details in this screen.

Table 11–37   Shipment Line Details Screen, Shipment Lines

Fields	
Shipment Line #	The shipment line number.
Shipment #	The shipment number associated with the return shipment.

Table 11–37   Shipment Line Details Screen, Shipment Lines

Fields	
Enterprise	The Enterprise associated with the return shipment.
Return #	The return number associated with the return shipment.
Order Line #	The order line number associated with the return shipment.
Release #	The release number associated with the return shipment.
Item ID	The item ID associated with the return shipment.
Description	The description of the item.
Product Class	The shipment line item's product class.
Unit of Measure	The shipment line item's unit of measure.
Expected Serial #	The serial number requested in the order.
Quantity	The shipment line's expected quantity. If the Receipt is made against an order, Quantity is displayed as 0.
Received Quantity	Indicates the quantity received for the item in this shipment. If the receipt is against an order, it indicates the quantity received for the order.
Original Qty	Indicates the original quantity on the order for the item.

Table 11–38   Shipment Line Details Screen, Additional Attributes

Field	Description
Ship By Date	Any additional shipment dates associated with the return shipment.
Serial #	The serial number associated with the return shipment's additional attributes.
Quantity	The quantity associated with the return shipment's additional attributes.

11.24 Delete Selected Containers

This screen lets you delete the selected containers from the Return Container List screen based on some constraints.

Table 11–39   Delete Selected Containers

Fields	
Backorder Removed Quantity	Select this checkbox if you want to backorder the quantity that is being deleted.
Remove Quantity from shipment line	Select this checkbox if you want to remove the quantity being deleted from the shipment lines.

Click OK to confirm the deletion of the containers.

11.25 View Holds

You can view holds that are applied to the return shipments in this screen.

Table 11–40

Fields	
Shipment #	The return shipment number.
Shipper's Ref. #	The return shipment reference number.
Plan #	The delivery plan number the return shipment is associated with.
Enterprise	The enterprise associated with the return shipment.
Buyer	The identifier for the buyer.
Seller	The identifier for the seller.
Ship Node	The node from where the return shipment is shipped.
Receiving Node	The node that is receiving the return shipment.
Status	The return shipment status.
Release #	The order release number to which the return shipment line belongs.

Table 11–40

Fields	
Has Hazardous Items	Indicates if the inbound shipment contains hazardous items.
Merge Node	If you have order lines coming from multiple nodes and want to consolidate them into one load, enter a node at which you want all of the dependent order lines to be consolidated with the parent order line. **Note:** Merge Node is only relevant in a Deliver Together dependency.

Table 11–41

Actions	
Add Holds	This action takes you to the Add Holds screen where you can add holds to the selected return shipment.
Fields	
Hold Description	A brief description of the hold.
Hold Status	The current status of the hold.
Hold Comment	Any additional comments for the hold.
Action	Select the action that you want to apply to the hold from the drop-down list.
Reason	Enter the reason for the hold.

Table 11–42

Fields	
Hold Description	A brief description of the hold.
Reason	The reason for changing this hold to resolved status.

11.26 Add Holds

You can add holds to the inbound shipment on this screen.

Table 11–43

Fields	
Hold Type	Select the hold type associated with the return shipment from the drop-down list.
Reason	Enter the reason for the hold.

12

Service Work Order Console Screens

The Work Order Console provides details on service requests such as provided and delivery services.

12.1 Work Order Search By All Attributes

You can search for work orders by all attributes in this screen.

> **Note:** Do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

Table 12–1   Work Order Search By All Attributes

Fields	
Node	Select the node you want to search for, if applicable.
Across Nodes	Select this option if you want to search for work orders across all nodes.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use.
Across Enterprises	Select this option if you want to search for work orders across all enterprises.
Work Order #	Enter the work order number associated with the work order for which you want to search.
Order #	Select the order number associated with the work order for which you want to search.
Work Order Status	Select the work order status range for which you want to search.

Table 12–1   Work Order Search By All Attributes

Fields	
Appointment Date Range	Enter the appointment date range you want to search for, if applicable.
Pre-call Status	Select the pre-call status associated with the work order you want to search for, if applicable.
Open Work Orders Only	Select the check box if you want to search for open work orders, if applicable.
Resource Pool	Enter the resource pool of the work order you want to search for, if applicable.
Service Complexity Level	Select the service complexity level of the work order you want to search for, if applicable.
Max Records	Enter the maximum number of work orders you want returned from your search.

The search results are displayed in the Work Order List screen.

12.2 Work Order List

The Work Order List window displays the results of a work order search. You can perform actions on a single work order or multiple work orders by selecting the check box(es) of the work order(s) you want to perform an action on and choosing the applicable action from the action bar.

Table 12–2   Work Order List

Actions	
View Details	Select this action to view the work order details of the selected work orders. For more information see Work Order Details screen.
Plan Appointment	Select the work order(s) for which you want to plan the appointment. This action can be performed only on work orders containing single appointments. For more information see Plan Work Order Appointment screen.
Record Completion	This action takes you to the Record Completion screen to confirm an appointment for the selected work orders.

Table 12–2   Work Order List

Record Service Failure	This action takes you to the Record Service Failure screen to enter the reasons for the appointment service failure for the selected work orders.
Cancel	This action pops up the Cancel Work Order screen to provide the code and reason to cancel the work order.
Service Tools	This action takes you to the Service Tools screen to add or remove the service tools associated with the selected work orders.
Work Order #	The work order number associated with the work order. Click this link to view work order details.
Node	The node associated with the work order.
Enterprise	The Enterprise associated with the work order.
Status	The status of the work order namely, Created, Cancelled and Completed.
Multiple Appointments	A flag Y is specified if the work order has multiple appointments, else the flag is set to N.
Appointment	The current appointment schedule associated with the work order.
Pre Call Status	The current pre-call status associated with the work order.

12.3 Work Order Details

You can view the details of an work order in this screen. This screen lets you perform certain actions and enables you to view some of the associated screens.

Table 12–3   Work Order Details Screen, Primary Information

View Icons	
🔔	**Active Alerts** - This icon takes you to the Work Order Alerts screen to view the alerts associated with the work order.
📖	**Status Audits** - This icon takes you to the Work Order Status Audits screen to view the work order status audits.

Table 12–3   Work Order Details Screen, Primary Information

	Instructions - This icon takes you to the Work Order Instructions screen to add or modify the instructions created for the work order.
	Notes - This icon takes you to the Work Order Notes screen to add notes or contact information associated with the work order. If notes have been added, the icon is displayed instead.
	Service Tools - This icon takes you to the Service Tools screen to add or remove the service tools associated with the work order.
Action	
View Holds	This action lets you view and manage order holds. For more information refer to View Holds screen for field level descriptions of the screen.
Cancel	This action pops up the Cancel Work Order screen to provide the code and reason to cancel the work order.
Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, `Provided Service` represents that the work order performs a Provided Service If the work order is designated as both a Provided Service and a Delivery Service, the priority goes to the Provided Service.

Table 12–3   Work Order Details Screen, Primary Information

Status	The current status of the work order. The valid statuses are • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

The service location address can be specified in the Service Location panel of the work order details screen. For more information refer to the Service Location screen details.

Table 12–4   Work Order Details Screen, Capacity Information

Fields	
Preferred Resource Pool ID	The preferred resource pool for the work order. If the work order contains both a Provided Service and a Delivery Service, only the Provided Service resource pool is able to be selected as a Preferred Resource Pool ID.
Preferred Resource ID	The resource ID associated with the preferred resource pool, if applicable.
Override Requested Capacity	This box is checked if the requested capacity is overridden.
Requested Capacity	The requested capacity for the work order.
Allocated Capacity	The allocated capacity for the work order. This also represents the blocked capacity when planning appointments.
Total Weight	The total capacity in terms of weight.
Total Volume	The total capacity in terms of volume.

Table 12–5   Work Order Details Screen, Execution Details

Fields	
Pre Call Status	The pre-call status associated with the work order.
Planning Complete	To indicate whether the work order planning is complete.
Multiple Appointments	To indicate whether the work order has multiple appointments.
Cancelled/Failed Appointments	The number of appointments that are cancelled or have failed.
	Click this link if you want to view the appointment details of cancelled or failed appointments. For more information see Work Order Appointments.

The `Open Appointments` panel have different actions for single and multiple appointments as described in the following table:

Table 12–6   Work Order Details Screen, Open Appointments

Actions	
Plan Appointment	This action takes you to the Plan Work Order Appointment screen if you did NOT select the `Multiple Appointments` checkbox when creating a work order.
	Note: This action is available only for single appointments.
Add	This action takes you to the Plan Work Order Appointment screen if you have selected `Multiple Appointments` checkbox when creating a work order.
	Note: This action is available only for multiple appointments.
Change	This action takes you to the Plan Work Order Appointment screen to modify an existing appointment for a work order.
	Note: This action is available only for multiple appointments.
Record Completion	This action takes you to the Record Completion screen to complete the appointment.

Table 12–6   Work Order Details Screen, Open Appointments

Record Failure	This action takes you to the Record Service Failure screen to enter the service failure reasons for the appointment.
Cancel	This action pops up a Modify Work Order screen to cancel the selected appointment.
View Execution Details	This action lets you view the Execution Details screen for completed appointments.
Fields	
Sequence No.	The sequence number of the appointments.
Appointment	The current appointment date and time.
Appointment Overridden	Specifies whether the appointment is overridden.
Allocated Capacity	Specifies the allocated capacity for the appointment.
Resource Pool ID	The associated resource pool ID of the appointment.
Resource ID	The associated resource ID of the appointment.
Appointment Status	The current status of the appointment. The valid statuses are: • Open • Failed • Cancelled • Completed

You can add or remove service lines from a work order in the `Service Lines` panel.

Table 12–7   Work Order Details Screen, Service Lines

Actions	
Add Line	This action takes you to the Add Service Lines screen to add service lines to the work order.
Remove Line	This action removes the selected service lines by popping up the Modify Work Order screen. Enter the relevant information and select OK. The selected service lines are removed.

Table 12–7   Work Order Details Screen, Service Lines

Fields	
Item Related Info	The item name and the description is provided.
	Click this link to view service request details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Item Group Code	The group code of the service item is specified. For example, if the service is a Provided Service then the item group code is `Provided Service`.
Required Quantity	The quantity of the service items required.

You can add or remove the products that are to be delivered as part of the work order.

Table 12–8   Work Order Details Screen, Products Being Delivered

Actions	
Add Line	This action takes you to the Add Products Being Delivered screen if you want to add a product with a delivery service.
Remove Line	This action removes the selected product lines by popping up the Modify Work Order screen. Enter the relevant information and select OK. The selected product lines are removed.
Fields	
Item Related Info	The item name and description is provided.
	Click this link to view service request details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
PC	The item's product class.
UOM	The item's unit of measure.
Required Quantity	The requested quantity by the service.
Delivered Quantity	The quantity to be delivered.

The work order is confirmed once the appointment and associated service lines are completed.

12.4 Work Order Alerts

A list of alerts raised for a work order can be viewed in this screen. From the Alerts table, find the alert you want to view and click on the Alert ID link. The Alert Console appears. For more information about using the Alert Console, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

Table 12–9   Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12–10   Alerts

Actions	
View Details	This action takes you to the alert detail screen for the selected alert ID. For more information about viewing the alert details, see the *Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Fields	
Alert ID	The alert ID. Click this link to view the alert details.
Type	The type of alert raised. For example, ON_FAILURE or FAILED_AUTH.
Description	A brief description of the alert.
Queue	The queue the alert has been assigned to.
Priority	The alert priority.
Owner	The user who is handling the alert.
Raised On	The date the alert was raised.

12.5 Work Order Status Audits

You can view any status modifications performed against a work order in the Work Order Details screen.

Table 12–11   Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.

Table 12–11   Primary Information

Fields	
Service Item Group	The service item group code associated with the order.
	For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are
	• Work Order Created
	• Work Order Completed
	• Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12–12   Work Order Status Audits Screen, Status Audits

Fields	
Sequence #	The sequence number associated with the work order.
	Click on the ⊞ to view and hide sequence details. The fields that can be viewed when expanded are explained below:
	<table><tr><td>Attribute</td><td>The name of the modified field.</td></tr><tr><td>Old Value</td><td>The old value of that field before modification.</td></tr><tr><td>New Value</td><td>The new value of that field after modification.</td></tr></table>
Audit Time	The time the work order was audited.
Action	The action performed on the work order.
Modified By	The user that performed the modification.

Table 12–12   Work Order Status Audits Screen, Status Audits

Fields	
Reason	The reason for the modification.
Comments	Additional information as to why the modification was made.

12.6 Work Order Instructions

You can view or modify instructions for a work order in this screen.

Table 12–13   Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12–14   Instructions

Action	
Delete Instruction	This action enables you to delete the selected instructions. Upon clicking this action, an alert window appears to confirm the deletion of instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other.
Text	The specific instructions to be performed on the order. Specify the instruction URL next to the icon.

12.7 Work Order Notes

Miscellaneous information may need to be stored on a work order. For example, the contact information of the individual to whom a product is being delivered, or for whom a service is being provided, may need to be entered and stored. Various execution details may also need to be entered while the work order is being planned or completed, like notes.

Table 12–15   Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide.*
Provider Organization	The provider organization associated with the order.

Table 12—15   Primary Information

Fields	
Service Item Group	The service item group code associated with the order. For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12—16   Notes Screen, Notes

Fields	
Contact Time	The time at which this note was added to the work order. This is defaulted to the creation time of the Notes pop-up window.
Contact User	The user who created this note. This is defaulted to the logged on user.
Reason Code	The reason code for this note.
Contact Type	The type of contact information on this note, for example phone or e-mail.
Contact Reference	The contact information on this note. For example, if contact type is phone, the contact's phone number can be entered here. If contact type is e-mail, the contact's e-mail address can be entered.
Add Note	The note for this work order.

Enter the relevant information and click `Save` to create the note.

12.8 Service Tools

You can add tools on a work order that can be used to perform the necessary services, for instance a latter, or a tool kit.

Table 12–17 Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12–18 Service Tools Screen, Service Tools

Action	
Remove	This action removes the selected service tools from the list.
Fields	

Table 12–18   Service Tools Screen, Service Tools

Service Tool ID	The identifier of the service tool.
UOM	The unit of measure for the service tool.
Short Description	The short description of the service tool.
Required Quantity	The quantity of the service tool that is required to perform this work order.
Comments	Any additional comment.

12.9 View Holds

Work orders can be placed on hold, preventing them from being processed by certain transactions, and preventing certain modification types from being applied. Using the Applications Manager, you can configure which transactions and modification types are disallowed for a work order on a particular hold type. Additionally, hold types can be configured to be applied automatically, for instance on work order creation, or upon resolution of another hold. For more information about defining and configuring hold types, see the *Sterling Distributed Order Management: Configuration Guide*.

Table 12–19   Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order.
	For example, `Provided Service` represents service group code for Provided Service

Table 12–19   Primary Information

Fields	
Status	The current status of the work order. The valid statuses are • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12–20   Work Order Holds Screen, Work Order Holds

View Icons	
View History	This icon takes you to the View History screen, where you can view the hold's history.
Action	
Add Holds	This action takes you to the Add Holds screen, where you can add holds to an order.
Fields	
Hold Description	The description of the hold.
Hold Status	The status of the hold. Holds can either be in created, resolved, or rejected status.
Hold Comment	The reason for applying this hold to the order, or changing the status of the hold.
Action	Select from the drop-down list the status to which you want to move this hold.
Reason	Enter the reason for changing the status of this hold.

Table 12–21   Work Order Holds Screen, Resolved Holds

View Icons	
View History	This icon takes you to the View History screen, where you can view the hold's history.

Table 12–21   Work Order Holds Screen, Resolved Holds

Fields	
Hold Type	The description of the hold.
Reason	The reason for changing this hold to resolved status.

Click `Save` to update the changes made in the screen, and close it.

12.10 Add Holds

You can add a hold to a work order, if that hold is not already being applied to the work order in `created` or `rejected` status. If you add a hold that was previously applied and now in `resolved` status, it removes that hold from the list of approved holds, and reset its status to `created`. That hold maintains its previous history records for that work order, and further status modifications is added on to that history.

Table 12–22   Add Holds Screen, Work Order Holds

Fields	
Hold Type	Select the hold type you want to apply to the order from the drop-down list.
Reason	Select the reason for adding this hold to the order.

Click `Save` to close this screen and apply the selected hold to the work order.

12.11 View History

Every time the status of a work order hold changes, useful information regarding the status change is recorded in Selling and Fulfillment Foundation. You can view, in this screen, the history of a work order hold.

Table 12–23   Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12–24   Hold History Screen, Work Order Holds

Fields	
Hold Type	The hold type for which the history is being displayed.
Date/Time	The date and time when the hold's status changed.
User ID	The user who performed the change on the hold.
Status	The status that the hold was moved to.

Table 12–24   Hold History Screen, Work Order Holds

Comment	The reason for the hold's creation or status change, if applicable.
Hold Transaction	The transaction responsible for the hold's status change.

12.12 Service Location

Table 12–25   Service Location Screen, Address

View Icons	
	Address Details- Choose this icon to modify or add a service location address in the Service Location panel of the Work Order Details screen.
	Additional Address Questions - Choose this icon to view or modify answers to address questions for this ship to address. If any questions have already been answered, a icon is displayed. For more information about the screen that is displayed, see the Questions screen.
	Permit Questions - Choose this icon to view or modify answers to permit questions for this ship to address. If any questions have already been answered, a icon is displayed. For more information about the screen that is displayed, see the Questions screen. This icon is only available at the order level.
Fields	
Address Line 1	The ship to address line 1.
Address Line 2	The ship to address line 2.
Address Line 3	The ship to address line 3.

Table 12–25   Service Location Screen, Address

Address Line 4	The ship to address line 4.
Address Line 5	The ship to address line 5.
Address Line 6	The ship to address line 6.
City	The city where the service has to be performed.
State	The state to which the city belongs to.
Postal Code	The postal code of the city.
Country	The country where the service has to be performed.
First Name	The vendor's first name.
Middle Name	The vendor's middle name.
Last Name	The vendor's last name.
Company	The company name of the vendor.
Day Time Phone	The vendor's day time phone number.
Evening Phone	The vendor's evening time phone number.
Mobile Phone	The vendor's mobile number.
Fax	The fax number.
E-mail	The vendor's e-mail address.
Additional Address and / or Permit Questions have been answered for this address.	This field is shown when additional address and/or permit questions have been answered for this address. Selecting the Retain Existing Answers radio button saves the answers for this address. Selecting Clear Answers clears all answers for this address.

Click `Save` to update any modifications in the screen.

12.13 Plan Work Order Appointment

You can take work order appointments in this screen. If you are planning a single appointment work order select `Plan Appointment` in the Work Order Details screen. Instead if the work order consists of multiple appointments you can choose `Add` in the Open Appointments panel of the Work Order Details screen or `Change` to modify an existing work order.

Table 12–26   Plan Work Order Appointment Screen, Work Order

Action	
Save AppointmentS	The work order appointment is saved with the help of this action. Upon clicking `Save Appointment` the Modify Work Order screen appears. Enter the relevant information and click OK.
Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order
Supervisor ID	The supervisor on this work order.

Table 12–27   Plan Work Order Appointment Screen, Constraints

Action	
Product Availability	The availability of the product can be found by selecting this action. This action takes you to the Product Availability screen where you can view the available products necessary to fulfill the appointment.

Table 12–27   Plan Work Order Appointment Screen, Constraints

Fields	
Waiting for Sequence Line	This flag is set to inform if there is any wait for sequence line completion before scheduling the appointment.
All Product Lines Available	This flag is set to Y if all products are available.
Constraints window	Mentions if there are any constraints applicable for the work order.

Table 12–28   Plan Work Order Appointment Screen, Override

Action	
Resource Availability	The resource pool details can be obtained by selecting this action. This action takes you to the Resource Availability screen where you can view the available resources necessary to fulfill the appointment.
Fields	
Consider Supplemental Capacity	Check this option if you want to consider supplemental capacity when looking for available resources for this appointment.
Resource Pool	Select the resource pool applicable for overrides, if applicable.
Ignore Product Availability	Check this option if you want to ignore product availability during the capacity inquiry.
Resource ID	Select the resource ID applicable for overrides, if applicable.
Ignore Node Notification Time	Check this option if you want to ignore the node's requested minimum notification time during appointment inquiry and update.

Table 12–29   Plan Service Appointment Screen, Available Slots

Fields	
Currently Chosen Appointment Slot	By default, the first available date and time displays. If overridden, it updates to reflect the values you choose.
Start Date	The first day displayed in the available slots table.
	Choose the Calendar lookup to change the date.
Number of Days to Consider	Enter the number of days beyond the start date that display in the available slot table. If the date for which you would like to schedule the service appointment does not appear within the available slots panels, you can increase this value to see available slots past what is currently displayed.
	To refresh the available slots table to new dates, enter a value and choose Go.
Requested Capacity	The capacity requested to plan the appointment duration.
	This field cannot be modified for single appointment work orders since the entire requested capacity is assumed.
	For multiple appointment work orders, the entire requested capacity minus the allocated capacity appears in this field. This number can be adjusted based on your needs. The chosen appointment is planned with this amount of capacity. If you intend to change the requested capacity, the GO button must be clicked before an appointment can be taken. This is to make sure that there is sufficient capacity available in the chosen slot to accommodate the new requested capacity value.
	The requested capacity can be zero but cannot be negative.

Table 12–29   Plan Service Appointment Screen, Available Slots

Fields	
Slot (Start Time - End Time)	The name of time slot and the range of time each time slot spans. There is one row for each time slot. Time slots do not overlap.
Available Slots Calendar	The first available time slot is automatically highlighted. Select this to choose the first time slot. Time slot availability is indicated by: • - The time slot has sufficient capacity. Select to make this the Currently Chosen Appointment Date. • on a white or blue background - The time slot does not have sufficient capacity. • - The time slot is the preferred time slot for this customer. • on a gray background - The region is not serviced for the time slot. • A gray background - The time slot is never serviced.

> **Note:**   The Available Slots inner panel on this screen does not display the days graph or the calendar when there is no available capacity for the resource pool.

12.14 Product Availability

The availability of the products can be viewed in this screen to make appointment changes.

Table 12–30   Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.

Table 12–30   Primary Information

Fields	
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12–31   Product Availability Screen, Product Availability

Actions	
ATP Options	The item or items availability to promise options can be viewed by selecting this action. For more information about ATP options, see the *Sterling Global Inventory Visibility: User Guide*.
Changes Nodes	This action takes you to the Change Nodes screen, when you can change the Ship Node or Procurement Node for this item.
Fields	
Item ID	The product item ID.
PC	Product class of the item.
UOM	The unit of measure of the item.
Item Description	The item description.

Table 12–31   Product Availability Screen, Product Availability

Ship Node	The item's ship node.
Procure From Node	The item's procurement node. A ⚠ icon indicates that the item is awaiting acceptance from a store or node.
Available Quantity	The available quantity of the item's inventory.
Available Date	The item's available date for shipping or performing the work order.
Future Availability Date	The future availability date as indicated by a user.
Comments	Comments as indicated by a user.

Click Save to update any changes made to this screen.

12.15 Change Nodes

Table 12–32   Change Nodes

Fields	
Order #	The order number.
Line #	The line number.
Item ID	The item identifier.
Unit of Measure	The unit of measure for this item.
Product Class	The product class for this item.
Ship Node	The ship node for this item. To change the ship node, enter a new ship node or select 🔍 which takes you to the node lookup screen.
Procure From Node	The procurement node for this item. To change the procurement node, enter a new procurement node or select 🔍 which takes you to the node lookup screen.

Click Save to save changes.

12.16 Resource Availability

The availability of the resources can be viewed in this screen.

Table 12–33   Resource Availability Screen, Resource Pool

Fields	
Resource Pool	The name of the resource pool associated with the work order.
Resource Pool Description	The description of the resource pool.
Node	The ship node of the resource pool.
Capacity Organization	The organization of the capacity node.
Supervisor ID	

Table 12–34   Resource Availability Screen, Resource Availability

Fields	
Start Date	The first day displayed in the available slots table.
	Choose the Calendar lookup to change the date.
Number of Days To Display	Enter the number of days beyond the start date that display in the available slot table. If the date for which you would like to view the capacity details does not appear within the available slots panels, you can increase this value to see available slots past what is currently displayed.
	To refresh the available slots table to new dates, enter a value and choose Go.
Resource ID	The identification of the resource associated with the appointment.

12.17 Record Completion

The appointment record can be completed by entering the information in the Execution Information panel and by selecting the associated service and product lines.

Table 12–35   Primary Information

Work Order #	The work order number associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Service Complexity Level	The service complexity level for this work order.
Appointment Status	The current status of the appointment. The valid statuses are: • Open • Failed • Cancelled • Completed
Appointment Overridden	Specified whether the appointment is overridden.
Supervisor ID	The identifier of the supervisor associated with this work order.
Resource Pool ID	The identifier of the resource pool that is executing this appointment.
Resource ID	The identifier of the resource that is executing this appointment.
Allocated Capacity	The capacity allocated for this appointment.
Appointment Sequence #	The sequence in which this appointment was taken.
Appointment Dates	The range of appointment dates and time for service execution.
Stop #	The stop number in the route of the resource that corresponds to this appointment.

Table 12–35   Primary Information

Execution Details	
Expected Start Time	The expected service execution start date and time.
Expected End Time	The expected service execution end date and time.
Work Effort Hours	The total time for the effort involved for the appointment specified in denominations of hours.
Execution Start Time	The service execution start date and time.
Execution End Time	The service execution end date and time.
Executed By	The service-engineer's name who performed the service.
Execution Reason	Select the execution reason for this appointment from the drop-down list.
Items Not Used	Enter the items that were returned back and were not used as part of the task.
Non Inventory Items Returned	Enter the special tools, used for a specific task, that were used and then returned back.
Additional Equipment Used	Enter any additional equipment that was used during the task.
Execution Comments	Additional information about the appointment execution.
Alerts	
Attention Required	Check this if you want a supervisor to be notified every time a change is made to a this appointment's execution details.
Alert Sales	Enter the message that should be sent to the sales representative upon changes to this appointment's execution details.
Alert Scheduler	Enter the message that should be sent to the scheduler upon changes to this appointment's execution details.
Vehicle Information	
Vehicle #	Enter the number of the vehicle used for this appointment order.

Table 12–35   Primary Information

Odometer Reading	Enter the odometer reading of the vehicle used for this appointment.
Request For Maintenance	Enter any maintenance work needed on the vehicle used for this appointment.

Table 12–36   Record Completion Screen, Team Members

Fields	
User ID	The identifier of a team member associated with this appointment.
User Name	The name of a team member associated with this appointment.

> **Note:** The list of team members gets automatically populated by Selling and Fulfillment Foundation if a resource ID is selected on the appointment, and if team members have been assigned to that resource in the Applications Manager. For more information about assigning team members to a resource, refer to the *Sterling Global Inventory Visibility: Configuration Guide*.

Table 12–37   Record Completion Screen, Service Lines

Fields	
Item Related Info	The item name and the description is provided.
Item Group Code	The group code of the service item is specified. For example, if the service is a Provided Service then the item group code is `Provided Service`.
Required Quantity	The quantity of the service items required.

Table 12–38   Record Completion Screen, Products Being Delivered

Fields	
Item Related Info	The item name and description is provided.
PC	The item's product class.

Table 12–38 Record Completion Screen, Products Being Delivered

Fields	
UOM	The item's unit of measure.
Quantity To Be Delivered	The requested quantity to be delivered by the service.
Actual Delivered Quantity	The quantity that was actually delivered by the service.

Click the `Complete` button to record the service completion once the details are entered in the fields.

12.18 Record Service Failure

You can record reasons for service failure from the Work Order Details screen or from the Work Order List screen by selecting single appointments only. For multiple appointments the failure reasons can be recorded only from the work order details screen.

Table 12–39 Primary Information

Work Order #	The work order number associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Service Complexity Level	The service complexity level for this work order.
Appointment Status	The current status of the appointment. The valid statuses are: • Open • Failed • Cancelled • Completed
Appointment Overridden	Specified whether the appointment is overridden.

Table 12–39   Primary Information

Supervisor ID	The identifier of the supervisor associated with this work order.
Resource Pool ID	The identifier of the resource pool that is executing this appointment.
Resource ID	The identifier of the resource that is executing this appointment.
Allocated Capacity	The capacity allocated for this appointment.
Appointment Sequence #	The sequence in which this appointment was taken.
Appointment Dates	The range of appointment dates and time for service execution.
Stop #	The stop number in the route of the resource that corresponds to this appointment.
Execution Details	
Expected Start Time	The expected service execution start date and time.
Expected End Time	The expected service execution end date and time.
Work Effort Hours	The total time for the effort involved for the appointment specified in denominations of hours.
Execution Start Time	The service execution start date and time.
Execution End Time	The service execution end date and time.
Executed By	The service-engineer's name who performed the service.
Execution Reason	Select the execution reason for this appointment from the drop-down list.
Items Not Used	Enter the items that were returned back and were not used as part of the task.
Non Inventory Items Returned	Enter the special tools, used for a specific task, that were used and then returned back.
Additional Equipment Used	Enter any additional equipment that was used during the task.
Execution Comments	Additional information about the appointment execution.
Alerts	

Table 12–39   Primary Information

Attention Required	Check this if you want a supervisor to be notified every time a change is made to a this appointment's execution details.
Alert Sales	Enter the message that should be sent to the sales representative upon changes to this appointment's execution details.
Alert Scheduler	Enter the message that should be sent to the scheduler upon changes to this appointment's execution details.
Vehicle Information	
Vehicle #	Enter the number of the vehicle used for this appointment order.
Odometer Reading	Enter the odometer reading of the vehicle used for this appointment.
Request For Maintenance	Enter any maintenance work needed on the vehicle used for this appointment.

Table 12–40   Record Completion Screen, Team Members

Fields	
User ID	The identifier of a team member associated with this appointment.
User Name	The name of a team member associated with this appointment.

Note: The list of team members gets automatically populated by Selling and Fulfillment Foundation if a resource ID is selected on the appointment, and if team members have been assigned to that resource in the Applications Manager. For more information about assigning team members to a resource, see the *Sterling Global Inventory Visibility: Configuration Guide*.

Click Save after entering the relevant information for the service failure.

12.19 Work Order Appointments

You can view cancelled or failed appointments by selecting the link for Cancelled/Failed Appointments in the Work Order Details screen `Execution Details` panel.

Table 12–41   Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12–42   Work Order Appointments Screen, Closed Appointments

Actions	
View Details	This action takes you to the Execution Details screen where you can view the details of failed appointments. **Note:** You cannot view the details of the cancelled appointment.
Fields	
Sequence No.	The line sequence number. Click this link to view the Execution Details screen.
Appointment	The confirmed or cancelled appointment date and time.
Appointment Overridden	Specifies the value of appointment overridden flag.
Allocated Capacity	The allocated capacity of the appointment line.
Resource Pool ID	The identification of the resource pool associated with the appointment.
Resource ID	The identification of the resource associated with the appointment.
Appointment Status	Specifies the current status of the appointment. The valid statuses are: • Open • Failed • Cancelled • Completed

12.20 Execution Details

You can view the execution details of an appointment by selecting the View Execution Details action in the Work Order Details screen, Open Appointment panel.

Note: You cannot view the details for the cancelled appointments.

Table 12–43   Primary Information

Work Order #	The work order number associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Service Complexity Level	The service complexity level for this work order.
Appointment Status	The current status of the appointment. The valid statuses are: • Open • Failed • Cancelled • Completed
Appointment Overridden	Specified whether the appointment is overridden.
Supervisor ID	The identifier of the supervisor associated with this work order.
Resource Pool ID	The identifier of the resource pool that is executing this appointment.
Resource ID	The identifier of the resource that is executing this appointment.
Allocated Capacity	The capacity allocated for this appointment.
Appointment Sequence #	The sequence in which this appointment was taken.
Appointment Dates	The range of appointment dates and time for service execution.
Stop #	The stop number in the route of the resource that corresponds to this appointment.
Execution Details	

Table 12–43   Primary Information

Expected Start Time	The expected service execution start date and time.
Expected End Time	The expected service execution end date and time.
Work Effort Hours	The total time for the effort involved for the appointment specified in denominations of hours.
Execution Start Time	The service execution start date and time.
Execution End Time	The service execution end date and time.
Executed By	The service-engineer's name who performed the service.
Execution Reason	Select the execution reason for this appointment from the drop-down list.
Items Not Used	Enter the items that were returned back and were not used as part of the task.
Non Inventory Items Returned	Enter the special tools, used for a specific task, that were used and then returned back.
Additional Equipment Used	Enter any additional equipment that was used during the task.
Execution Comments	Additional information about the appointment execution.
Alerts	
Attention Required	Check this if you want a supervisor to be notified every time a change is made to a this appointment's execution details.
Alert Sales	Enter the message that should be sent to the sales representative upon changes to this appointment's execution details.
Alert Scheduler	Enter the message that should be sent to the scheduler upon changes to this appointment's execution details.
Vehicle Information	
Vehicle #	Enter the number of the vehicle used for this appointment order.

Table 12–43   Primary Information

Odometer Reading	Enter the odometer reading of the vehicle used for this appointment.
Request For Maintenance	Enter any maintenance work needed on the vehicle used for this appointment.

Table 12–44   Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are • Work Order Created • Work Order Completed • Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12–45   Record Completion Screen, Team Members

Actions	
Remove	This action removes the selected team members from the list of team members associated with this appointment.
Fields	
User ID	The identifier of a team member associated with this appointment.
User Name	The name of a team member associated with this appointment.

> **Note:** The list of team members gets automatically populated by the Selling and Fulfillment Foundation if a resource ID is selected on the appointment, and if team members have been assigned to that resource in the Applications Manager. You can add team members by clicking the ✚ icon. For more information about assigning team members to a resource, see the *Sterling Global Inventory Visibility: Configuration Guide*.

12.21 Add Service Lines

You can add service lines to the work order details with the help of this screen.

Table 12–46   Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.

Table 12–46   Primary Information

Fields	
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order.
	For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are
	• Work Order Created
	• Work Order Completed
	• Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12–47   Add Service Lines Screen, Provided Services

Fields	
Item ID	The provided service item ID.
Description	The provided service item description.
Ship Node	The shipping node associated with the service
Line Qty	The service item quantity.

Table 12–48   Add Service Lines Screen, Delivery Services

Fields	
Item ID	The delivery service item ID.
Description	The delivery service item description.
Ship Node	The shipping node associated with the delivery.
Line Qty	The delivery item quantity.

Click `Save` after selecting the relevant provided services and delivery services.

12.22 Add Products Being Delivered

The products being delivered is added to the work order using this screen.

Table 12–49   Primary Information

Fields	
Work Order #	The work order number associated with the work order.
Enterprise	The Enterprise associated with the work order.
Node	The node associated with the work order.
Order #	The order number associated with the work order. Click this link to view order details. For more information, refer to the *Sterling Distributed Order Management: User Guide*.
Provider Organization	The provider organization associated with the order.
Service Item Group	The service item group code associated with the order. For example, `Provided Service` represents service group code for Provided Service
Status	The current status of the work order. The valid statuses are - Work Order Created - Work Order Completed - Work Order Cancelled
Service Complexity Level	The service complexity level for this work order.
Supervisor ID	The identifier of the service supervisor associated with this work order.

Table 12–50   Adding Products Being Delivered Screen, Products Being Delivered

Fields	
Item ID	The item ID to be delivered.
PC	Product class of the item.

Table 12–50   Adding Products Being Delivered Screen, Products Being Delivered

Fields	
UOM	The unit of measure of the item.
Description	The item description.
Ship Node	The item's ship node.
Delivery Date	The requested delivery date of the product on the order line.
Required Qty	The item's required quantity.

Click Save once the relevant products are added.

12.23 Modify Work Order

The modify work order window appears when you make modifications to the work order details or work order appointment screens.

Table 12–51   Modifying a Work Order

Field	Descriptions
Reason Code	Select the reason code for work order modification.
Comments	Additional information about why the work order was modified.

12.24 Cancel Work Order

You can provide a cancellation code and reason for cancelling a work order.

> **Note:** Work order cancellation depends on the status of the service lines. If the work order contains any service lines that are completed and any products that are delivered, the work order status is marked as `Completed` and any remaining open appointments are `Cancelled` and their allocated capacity is removed from the associated resource pool.

Table 12–52   Cancel Work Order

Field	Descriptions
Reason Code	Select the reason code for work order cancellation.
Comments	Additional information about why the work order was cancelled.

12.25 Questions

The address or permit questions and answer options displayed on this screen are preconfigured. For more information about configuring questions and answer options, refer to the *Sterling Distributed Order Management: Configuration Guide*.

Once you have selected or entered your necessary answers, click Save.

13

Serviced Area Search Screens

The serviced area search console allows you to check whether an enterprise services a particular postal zip code through a seller organization for a given service type. Selling and Fulfillment Foundation looks for available resources and capacity across all the resource pools for the user's enterprise.

13.1 Serviced Area Search

This search screen determines whether or not the requested service type is serviced for the a given enterprise, seller organization and postal code, and whether capacity is currently available for each time slot of each day.

If no zip code is entered in the search screen, Selling and Fulfillment Foundation behaves in one of the following ways:

- If a region or set of regions is not defined by a set of zip codes, Selling and Fulfillment Foundation returns the service availability for that region or set of regions.

- If all the regions are defined by postal zip codes, Selling and Fulfillment Foundation returns no service availability.

Table 13–1   Serviced Area Search

Fields	
Enterprise	From the drop-down list, select the enterprise that is responsible for the services.
Seller	From the drop-down list, select the seller organization that provides the services.
Country	This field is defaulted to the country of the user that is logged in.

Table 13–1   Serviced Area Search

Fields	
Service Type	From the drop-down list, select the service type that you want to search for. This field is mandatory.
Postal code	Enter the postal code that you want to search for.

The Serviced Area List screen is displayed as a result of this search.

13.2 Serviced Area List

This list screen displays whether or not the service type for the requested postal code is serviced for each time slot, and for each day.

Table 13–2   Serviced Area List Screen, Available Slots

Fields	
Slot (Start Time- End Time)	Indicates the time slots associated with this region.
Days of Week	If the requested postal code is serviced for the day of the week and capacity is available, a green checkmark appears.
	If the requested postal code is serviced for the day the week but capacity is not available, a red cross appears.
	If the requested postal code is not ever serviced for the day of the week, a grey background appears, with no icon on top of it.

14

Route Entry Screens

The route entry console allows you to plan the route of a node's resources throughout the day. For example, a resource that has 4 appointments in a given day may want to sequence them in the most efficient possible way by specifying stop numbers, and expected start time for each appointment.

14.1 Work Order Appointments Search

This screen looks for open appointments in a time range for a given node. A resource pool and a resource can be specified to narrow down the search. Otherwise, all appointments within the specified time range for all the resource pools and resources for a node is returned.

Table 14–1   Work Order Appointments Search

Fields	
Node	Enter the node from which the provided or delivery services are being performed.
Delivery Service	Check this if you want to look for delivery service appointments.
Provided Service	Check this if you want to search for provided service appointments.
Resource Pool	From the drop-down list, select the resource pool whose appointments you want to search for.
Resource	From the drop-down list, select the resource whose appointments you want to search for.
Appointment Start Date	Select the start date of the appointments you are searching for.

The Route Entry screen is displayed as a result of this search.

14.2 Route Entry

This screen displays the list of appointments, grouped by resource pool.

Table 14–2   Route Entry Screen, Work Order Appointments

Actions	
Override Team Members	This action takes you to the Override Team Members screen, where you can override the default team members for all the selected appointments.
Fields	
Work Order # / Appt #	The appointment number, and work order number in which that appointment is defined.
Promised Appointment	The date and time of the appointment.
Resource	From the drop-down list, select the resource responsible for completing the appointment.
Stop #	Enter which stop number this appointment corresponds to in your resource's route.
Expected Start Time	Enter the expected start time of the appointment.
Expected End Time	Enter the expected end time of the appointment.

Click Save to update the routing information for the modified appointments.

14.3 Override Team Members

This screen allows you to override the list of assigned team members to an appointment. Overriding team members resets the list of team members for an appointment, and replace it anew.

Table 14–3   Override Team Members Screen, Team Members

Fields	
User ID	The identifier of the team member to be associated with the selected appointments.
User Name	The name of the team member to be associated with the selected appointments.

Use the icon to add new team members, and click `Save` once you are done.

Index

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