Sterling Selling and Fulfillment Foundation

IBM

Distributed Order Management User Guide

Release 9.1

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Note

Before using this information and the product it supports, read the information in "Notices" on page 227.

Contents

Chapter 1. Distributed Order Management Overview

IBM Sterling Distributed Order Management Overview

Distributed Order Management enables you to manage the lifecycle of sales orders. The *Sterling Selling and Fulfillment Foundation: Product Concepts Guide* introduces concepts regarding sales orders. This document builds on that guide and explains how to use the Order consoles.

The Distributed Order Management module consists of the following components:

- **Create Order Console** - enables you to create order, draft orders and transfer orders. The screen level information is explained in Create Order Screens.
- **Order Console** - enables you to view order details, order alerts, order releases, order invoice details, order shipments, order instructions and notes. The screen level information is explained in Order Console Screens.
- **Create Outbound Shipment** - enables you to create a outbound shipment and setting up shipment supervisory overrides. The screen level information is explained in Chapter 11, Create Outbound Shipment Screens.
- **Outbound Shipment Console** - enables you to track outbound shipments and container, create picklist, splitting shipments and so on. The screen level information is explained in Chapter 12, Outbound 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 13, Service Work Order Console Screens.
- **Accept/Reject Transfer Console** - enables you to viewing pending transfers from your location. You can accept or reject transfers. The screen level information is explained in Accept/Reject Transfer 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 15, Serviced Area Search Screens.
- **Route Entry -** enables you to enter a resource's route. The screen level information is explained in Chapter 16, Route Entry Screens.

Understanding the Sterling Distributed Order Management User Interface Icons

The following table describes the icons used in the Sterling Distributed Order Management user interface.

Table 1. Sterling Distributed Order Management User Interface Icons

Icon	Name	Description
	**Activity Demand**	Enables you to view the activity demand for a shipment, container and so on.
	**Add**	Enables you to add an instruction line, charges, and so on.
	**Add Preferred**	Indicates the preferred time slot for the customer.

Table 1. Sterling Distributed Order Management User Interface Icons (continued)

	Add Provided Service	Enables you to associate a provided service request with an order or order line.
	Additional Attributes	Enables you to specify additional attributes for identification, shipping and so on.
	Additional Questions	Enables you to answer questions about the address.
	Additional Questions Check	Indicates one or more questions about the address have been answered.
	Address	Enables you to add or modify an address.
	Address Details	Enables you to view, modify, or add an address.
	Alert	Enables you to view the alerts for an order, shipment and so on.
	Audit	Enables you to view the list of audits for the order, container and so on.
	Calendar	Enables you to select a date from the calendar.
	Chained Orders	Enables you to view related orders or order lines.
	Charges and Taxes	Enables you to add, modify, or view the charges and discounts for an order, shipment, and so on.
	Containers	Enables you to view all packed containers included in the shipment.
	Delete	Enables you to remove a team member, time slot and so on.
	Delivery Item	Enables you to view the delivery service request associated with the order or order line.
	Dependent Child	Enables you to view the order line's dependency.
	Dependent Parent	Enables you to view the order line's dependency.
	Gift	Indicates an order line that is a gift.
	Instructions	Enables you to view, modify, or add instructions for a work order, shipment and so on.
	Instructions URL	Enables you to specify the instruction URL.
	Inventory Information	Enables you to add the tag identifiers and tag attributes for the order line.
	Invoices	Enables you to view the order invoices.
	Kit Components	Enables you to view the order line's kit components or bundle components.
	Line Has Constraints	Indicates the line has some associated constraints.

Table 1. Sterling Distributed Order Management User Interface Icons (continued)

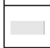
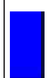
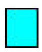
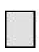
	**Load**	Enables you to view the loads that are carrying the shipment.
	**Lookup**	Enables you to search for shipments, team members and so on.
	**Negotiations**	Enables you to view the list of order negotiations.
	**Nonworking Day**	Indicates the line's nonworking days.
	**Notes**	Enables you to add notes or contact information for an order, work order and so on.
	**Notes Check**	Indicates notes or contact information have already been entered for the order, work order and so on.
	**Order Releases**	Enables you to view the list of releases for the order, based on the release number, ship node and status.
	**Payment Collection**	Enables you to view collection details for the order.
	**Payment Types**	Enables you to view the payment information for the selected payment rule. You can also add or create payment types, debit or credit memos.
	**Permit Questions**	Enables you to answer permit questions for an order.
	**Permit Questions Check**	Indicates one or more permit questions have already been answered.
	**Plus**	Enables you to alternatively view and hide details about the selected object, such as tag details or sequence details.
	**Provided Item**	Enables you to view or cancel the service requests associated with the order or order line.
	**Reservations**	Indicates the item availability date.
	**Return Receipt**	Enables you to view receipt information for the order.
	**Return Receipt History**	Enables you to record any discrepancies found when receiving an order.
	**Service Tools**	Enables you to add or remove the service tools associated with the work order.
	**Shipment Data Types**	Enables you to view or modify shipment dates and delivery dates.
	**Shipments**	Enables you to view the shipment and container details of the order release.
	**Shipping Cartons**	Enables you to view the expected ship date.
	**Timestamp**	Enables you to enter the time.
	**Toggle**	Enables you to enter the serial range of the items for pack containers.

Table 1. Sterling Distributed Order Management User Interface Icons (continued)

	**View History**	Enables you to view the history of the shipments that are held.
	**Warning Indicator**	Indicates the item is waiting for acceptance from a store or node.
	**Work Order Hold**	Enables you to view holds that are applied to the shipment.
	**Work Orders**	Enables you to view the related work orders associated with the sales order, delivery request and so on.

The following table describes the color icons used in the Dock Appointment Calendar.

Table 2. Color Icons in the Dock Appointment Calendar

Icon	Name	Description
	**Blue**	Indicates an appointment for the searched criteria. Click a slot to modify an existing appointment.
	**Cyan**	Indicates appointments that do not match the searched criteria. Click a slot to modify an existing appointment.
	**Gray**	Indicates free slots for which new appointments can be taken. Click a slot to create a new dock appointment.
	**Black**	Indicates the unavailable slots due to the calendar constraints.

Chapter 2. Entering a Resource's Route

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 Sterling Selling and Fulfillment Foundation to record which stop number corresponds to which appointment.

This can be done in the following steps:

1. Search for service work order appointments
2. View service work orderappointments
3. Assign stop numbers to appointments for a resource

Searching for Service Work Order Appointments

About this task

To search for service work order appointments:

Procedure

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 the Work Order Search By All Attributes Table.
3. When you've entered the applicable information, click **Search**. This takes you to the Route Entry screen.

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.

Assigning Stop Numbers To Appointments for a Resource

About this task

To assign stop numbers for appointments:

Procedure

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 **Timestamp** 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 **Timestamp** icon and select it from the pop-up window.
5. Once you are satisfied with your route, click `Save`.

Chapter 3. Adding or Removing Service Tools to a Service Work Order

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. Sterling Selling and Fulfillment Foundation lets you associate one or more service tools to a service work order. The 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.

About this task

This can be done in the following steps:

Procedure

1. Search for a service work order.
2. View service tools for a service work order.
3. Add or remove service tools for a service work order.

Searching for a Service Work Order

About this task

To search for applicable service work orders:

Procedure

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 306 on page 201.
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.

Viewing Service Tools for a Service Work Order

About this task

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 **Service Tools** icon. The Service Tools screen displays. The Service Tools inner panel displays the service tools that can be associated with the service work order.

Adding Service Tools to a Service Work Order

About this task

From the Service Tools Tools screen, you can add service tools for the service work order. To add a service tool to a service work order:

Procedure

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

About this task

From the Service Tools Tools screen, you can remove service tools for the service work order. To remove a service tool from a service work order:

Procedure

1. Uncheck the checkbox next to the identifier of the service tool you want to remove.
2. Click `Save`.

Chapter 4. Determining Whether an Area is Serviced

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. Search for a serviced area
2. View the available time slots

Searching for a Serviced Area

About this task

To search for a serviced area:

Procedure

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 345 on page 223.
3. When you have entered the applicable information, click `Search`. The Serviced Area List screen displays.

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.

Sterling 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.

Chapter 5. Taking an Appointment on a Service Work Order

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. Search for a service work order
2. View planned appointments
3. Take an appointment

Searching for a Service Work Order

About this task

To search for applicable service work orders:

Procedure

1. From the navigation bar, select Order > Service Work Order Console. The Table 306 on page 201screen displays.
2. Enter the search criteria for the work order as applicable.
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" on page 202 screen display where you can view details for the service work order you selected.

Viewing Planned Appointments

About this task

To view planned appointments:

Procedure

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.

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.

Sterling 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

Sterling 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, Sterling 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 for Service Work Order Appointments

About this task

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

Procedure

1. In the Available Slots inner panel, click the **Calendar** 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 an **Add** 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 an **Add Preferred** 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.

Results

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.

Chapter 6. Managing Team Members on Service Work Order Appointments

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, Sterling 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

Changing the Team Members for Service Work Order Appointments

About this task

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:

Procedure

1. Search for a service work order
2. View the team members
3. Add or remove the team members

Searching for a Service Work Order

About this task

To search for applicable service work orders:

Procedure

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 306 on page 201.
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.

Viewing the Team Members

About this task

To view the team members currently assigned to an appointment:

Procedure

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.

Adding a Team Member

About this task

To add a team member to an appointment:

Procedure

1. Click the **Add** icon in the Team Members inner panel.
2. In the text box, enter the identifier of the team member or click the **Lookup** 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 **Delete** icon.

Removing a Team Member

About this task

To remove one or more team members from this appointment:

Procedure

1. Select the checkbox of the team members you want to remove.
2. Click the `Remove` action in the Team Members inner panel.

Overriding Team Members for Service Work Order Appointments

About this task

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:

Procedure

1. Search for service work order appointments
2. View service work order appointments
3. Create the new list of team members

Searching for Service Work Order Appointments

About this task

To search for service work order appointments:

Procedure

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 the Work Order Search By All Attributes Table.
3. When you've entered the applicable information, click **Search**. This takes you to the Route Entry screen.

Viewing Service Work Order Appointments

About this task

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.

Creating the New List of Team Members

About this task

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

Procedure

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 **Add** icon. In the text box, enter the identifier of the team member or click the **Lookup** icon to look it up. If you want to remove a team member from your new list, click the **Delete** icon.
4. Once you are satisfied with your list, click `Save`.

Chapter 7. Handling Procurement Requests

Handling Procurement Requests

Certain nodes require you to manually confirm transfer requests before a procurement order is placed. This allows you to determine whether the desired inventory is physically available and prevent the possible reservation of unavailable inventory due to an incorrect inventory picture. This functionality is used based on your configuration defined in the Applications Manager, and appears in the Application Console if applicable to your node.

This task assumes that a procurement request has already been placed against your node and that your node has been configured to require manual transfer acceptance. As an Application Console node user, you can accept or reject these requests.

Viewing Pending Procurement Requests

About this task

To search for pending procurement requests.

Procedure

From the navigation bar, select Order > Accept/Reject Transfers. The Accept/Reject Procurement Requests screen displays all requests currently awaiting reservation acceptance.

Accepting a Procurement Request

About this task

From the Accept/Reject Procurement Requests screen, you can accept or reject pending procurement requests after determining whether the requested inventory is physically available at your node. You can also accept or reject multiple requests at once.

When accepting a procurement request, you have the ability to accept all of the requested quantity or only part of the requested quantity. To accept a procurement request:

Procedure

1. Identify the requests you want to accept.
2. From the Action dropdown, select Accept.
3. In the Action Quantity field, enter the amount you want to accept. On default, the action quantity is the total requested quantity.
4. Click Save to confirm your acceptance. The screen updates with your changes.

   Note: When accepting less than the total requested quantity, the remaining quantity is rejected.

Rejecting a Procurement Request

About this task

From the Accept/Reject Procurement Requests screen, you can accept or reject pending procurement requests after determining whether the requested inventory is physically available at your node. You can also accept or reject multiple requests at once.

When rejecting a procurement request, all of the requested quantity is rejected. To reject a procurement request:

Procedure

1. Identify the requests you want to reject.
2. From the Action dropdown, select Reject.
3. The Action Quantity field is displays the total requested quantity. This field cannot be changed.
4. Click Save to confirm your rejection. The screen updates with your changes.

Chapter 8. Answering Permit or Address Questions

Answering Permit or Address Questions

Certain orders may require you to answer permit or address questions. Questions can be pre-configured in the Applications Manager and appear for an order in the Application Console.

This task assumes that an order has already been created and that questions and answer options are used in your service processes.

As an Application Console user, you can add or modify answers on the questionnaire.

Searching for an Order

About this task

To look for the applicable orders:

Procedure

1. From the navigation bar, select Order > Order Console. The Order Search By Status Screen screen displays.
2. Enter the search criteria for the order as applicable. When you have entered the applicable information, click Search. This takes you to the Order List Window screen.
3. Select the checkbox of the orders for which you want to view details, and click the View Details action. This takes you to the Order Detail Screen screen.

Viewing the Questions and Answers for an Order

From the Order Detail Screen screen, you can view the questions that can be answered for the order.

Table 3. Viewing Questions and Answers for the Order

Type of Question	Description
Address questions	In the Ship To panel, clicking the **Additional Questions** icon takes you to the Address “Questions” on page 149 screen, which displays the address questions that can be answered for this order. The **Additional Questions Check** icon displays in the Ship To panel if any answers to address questions currently exist for this order.
Permit questions	Clicking the **Permit Questions** icon takes you to the Permit “Questions” on page 149 screen, which displays the permit questions that can be answered for this order. The **Permit Questions Check** icon displays in the Ship To panel if any answers to permit questions currently exist for this order.

The “Questions” on page 149 screen also displays any answers that have been previously entered.

Answering Questions on an Order

About this task

From the “Questions” on page 149 screen, you can add answers or modify previous answers for questions on the Order.

The address or permit questions and answer options that display are pre-configured. Once you have selected or entered your necessary answers, click Save.

Note that answer to address questions may have capacity impact, that affect the calculated capacity required to perform the service. Therefore, address questions should be answered to ensure that appropriate capacity is calculated to perform the service.

Chapter 9. Create Order Screens

Order Entry Screen

You can create a sales order or a transfer order using this screen.

You can also create an order by copying an existing order. For more information about copying orders, see Copy Order Screen.

Table 4. Order Entry

Field	Description
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.
Currency	Select the currency with which any transactions are to be handled in.

Once the field details are entered, click the `Create Order` button. The Order Detail Screen screen displays.

Chapter 10. Order Console Screens

Order Search By Status Screen

You can search for orders that fall under a particular status with the help of this screen.

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 5. Order Search By Status

Field	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	Enter the order number you are searching for, if applicable.
Buyer	Enter the Buyer of the orders you want to search for, if applicable.
Seller	Enter the Seller of the orders you want to search for, if applicable.
Exchange Order With Type	Check this if the order you want to search for is an exchange order If this is checked, you can select from the drop-drown list the exchange type of the order for which you want to search. If no exchange type is selected, Sterling Selling and Fulfillment Foundation searches for all the exchange order types.
Buyer Account Number	Enter the Buyer's account number you want the orders you are searching for to be associated with, if applicable.
Order Line Status	Select the status range of the orders you want to search for, if applicable.
Payment Status	Select the payment status the orders you are searching for are in, if applicable.
Held Orders	Select if the orders you are searching for are being held.
Sale Voided Orders	Select if the orders you are searching for are voided.
Hold Type	If you selected Held Orders, select the hold type with which the orders you are searching for are associated.

Table 5. Order Search By Status (continued)

Field	Description
Order State	Select to search for orders in one of the following conditions: • Open - orders that have not been closed • Recent - all orders (open and closed) that have not yet been sent to the history tables • History - orders that have been sent to the history tables • All - all orders (open, recent, and history)
Max Records	Enter the maximum number of orders you want returned from your search.

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

Order Search By Item Screen

You can search for orders based on the item information such as product class, unit of measure, item ID and so on.

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 6. Order Search By Item

Field	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	Enter the order number you are searching for, if applicable.
Buyer	Enter the Buyer of the orders you want to search for, if applicable.
Seller	Enter the Seller of the orders you want to search for, if applicable.
Item ID	Enter the item ID to search for orders containing a specific item, if applicable.
Product Class	Select an item product class to search for orders containing an item that has a specific product class, if applicable.
UOM	Select an item unit of measure to search for orders containing an item that has a specific unit of measure, if applicable.
Item Description	Enter the item description you want the orders you are searching for to be associated with, if applicable.
Customer Item ID	Enter the customer's item ID to search for orders containing an item that has a specific customer item ID, if applicable.

Table 6. Order Search By Item (continued)

Field	Description
Customer PO Number	Enter the customer's purchase to search for orders containing an item that has a specific customer purchase order number, if applicable.
Max Records	Enter the maximum number of orders you want returned from your search.

The Order List Window screen is displayed as a result of the order search by item.

Order Search By Date Screen

You can search for orders that fall within a particular date range for shipments and delivery with the help of this screen.

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 7. Order Search By Date

Field	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	Enter the order number you are searching for, if applicable.
Buyer	Enter the Buyer of the orders you want to search for, if applicable.
Seller	Enter the Seller of the orders you want to search for, if applicable.
Buyer Account Number	Enter the Buyer's account number with the orders you want to search for, if applicable.
Order Date	Enter the order date range through which you want to search for orders, if applicable.
Requested Ship Date	Enter the requested shipping date range through which you want to search for orders, if applicable.
Requested Delivery Date	Enter the requested delivery date range through which you want to search for orders, if applicable.
Max Records	Enter the maximum number of orders you want returned from your search.

The Order List Window screen is displayed as a result of this order search by date.

Order Search By Address Screen

You can search for orders that belong to a billing or shipping address with the help of this screen.

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. Order Search By Address

Field	Description
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.
Order Number	Enter the order number you are searching for, if applicable.
Buyer	Enter the Buyer of the orders you want to search for, if applicable.
Seller	Enter the Seller of the orders you want to search for, if applicable.
Item ID	Enter the item ID to search for orders containing a specific item, if applicable.
Address Lookup	Select an address by clicking on the address lookup. Select any one of the following options for the order search: • Ship To - Select "Ship To" to search for orders that has either the order level or the order line level ship to address as the specified address. • Bill To - Select "Bill To" to search for orders that has bill to address as the specified address. • Either - Select "Either" to search for orders that either has order level or the order line level ship to address or has bill to address as the specified address.
Carrier Service	Enter the Carrier Service Code of any order line for the order you want to search for, if applicable.
Order State	Select to search for orders in one of the following conditions: • Open - orders that have not been closed • Recent - all orders (open and closed) that have not yet been sent to the history tables • History - orders that have been sent to the history tables • All - all orders (open, recent, and history)
Max Records	Enter the maximum number of orders you want returned from your search.

Because zip codes are mandatory for a search by address, addresses that do not contain a zip code, such as those that are defined within a region that services an entire country or region, are not listed.

The Order List Window screen is displayed as a result of this order search by address.

Order Search By Draft Orders Screen

You can search for draft orders with the help of this screen. Draft orders are orders in the process of being entered that have not been confirmed.

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 9. Order Search By Draft Orders

Field	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	Enter the order number you are searching for, if applicable.
Buyer	Enter the Buyer of the draft orders you want to search for, if applicable.
Seller	Enter the Seller of the draft orders you want to search for, if applicable.
Buyer Account Number	Enter a Buyer account number to search for draft orders containing a particular Buyer account number, if applicable.
Max Records	Enter the maximum number of orders you want returned from your search.

The Order List Window screen is displayed as a result of this draft order search.

Order List Window

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

Table 10. Order List

Action	Description
View Details	This action takes you to the Order Detail Screen screen to view the details for the selected orders.
View Alerts	This action takes you to the Order Alerts Screen screen where you can view the alerts raised for the selected orders.
View Releases	This action takes you to the Order Releases for Order Screen screen where you can view the order releases.
View Invoices	This action takes you to the Order Invoices Screen screen to view the invoices associated with the order.

Table 10. Order List (continued)

View Shipments	This action takes you to the Order Shipment Items and Containers Screen screen to view the shipments and shipment containers for the selected orders.
View Instructions	This action takes you to the Order Instructions Screen screen to view, add, modify or delete the order instructions.
View Notes	This action takes you to the Notes Screen screen to view, modify or add the order notes.
View Audit	This action takes you to the Order Audits Screen screen to view the audits for the selected orders.
Schedule	This action schedules the selected orders based on the rules defined in the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.
Release	This action releases the selected orders that are in a `Scheduled` Status.
Cancel	This action takes you to the Modification Reason Screen screen to cancel the selected orders. Enter the reason code and the reason text to confirm the cancellation, and click OK. The selected orders will be cancelled.
Remove	This action can be used to remove the selected **Draft** orders only.
Create Return	This action takes you to the Returnable Order Lines Screen screen where you can create returns for order lines that are returnable.
Restore	This action can be used to restore the selected **History** orders only.
Confirm	This action can be used to confirm **Draft** orders only.
View Holds	This action takes you to the View Holds Screen screen to view, add or remove the holds for the selected orders.
Copy Order	This action takes you to the Copy Order Screen screen where you can create a copy of the selected order. Only a single order can be copied at a time.
Field	
Order #	The order number. Click this link to view the Order Detail Screen screen.
Status	The current status of the order. If a lock icon appears here, the order is on hold. If a history icon appears here, the order is a history order.
Enterprise	The Enterprise associated with the order.
Buyer	The Buyer organization that placed the order.
Order Date	The date the order was placed.
Total Amount	The order's total amount.

The order list screen can also be viewed in detail by selecting the Detailed Order List Screen screen from the drop-down option next to the screen name.

Detailed Order List Screen

This screen can be viewed with the help of the drop-down button in the Order List Window screen.

Table 11. Detailed Order List

Action	Description
View Details	This action takes you to the Order Detail Screen screen to view the details for the selected orders.
View Alerts	This action takes you to the Order Alerts Screen screen where you can view the alerts raised for the selected orders.
View Releases	This actions takes you to the Order Releases for Order Screen screen where you can view the order releases.
View Invoices	This action takes you to the Order Invoices Screen screen to view the invoices associated with the order.
View Shipments	This action takes you to the Order Shipment Items and Containers Screen screen to view the shipments and shipment containers for the selected orders.
View Instructions	This action takes you to the Order Instructions Screen screen to view, add, modify or delete the order instructions.
View Notes	This action takes you to the Notes Screen screen to view, modify or add the order notes.
View Audit	This action takes you to the Order Audits Screen screen to view the audits for the selected orders.
Schedule	This action schedules the selected orders based on the rules defined in the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.
Release	This action releases the selected orders that are in a `Scheduled` Status.
Cancel	This action takes you to the Modification Reason Screen screen to cancel the selected orders. Enter the reason code and the reason text to confirm the cancellation, and click OK. The selected orders will be cancelled.
Remove	This action can be used to remove the selected **Draft** orders only.
Create Return	This action takes you to the Returnable Order Lines Screen screen where you can create returns for order lines that are returnable.
Restore	This action can be used to restore the selected **History** orders only.
Confirm	This action can be used to confirm **Draft** orders only.
View Holds	This action takes you to the View Holds Screen screen to add or remove the holds for the selected orders.
Copy Order	This action takes you to the Copy Order Screen screen where you can create a copy of the selected order. Only a single order can be copied at a time.
Field	
Order #	The order number. Click this link to view the Order Detail Screen screen.

Table 11. Detailed Order List (continued)

Status	The current status of the order. If a lock icon appears here, the order is on hold. If a history icon appears here, the order is a history order.
Enterprise	The Enterprise associated with the order.
Buyer	The Buyer organization that placed the order.
Order Date	The date the order was placed.
Order Type	The type of the order.
Order Name	The name of the order.
Total Amount	The order's total amount.

Order Detail Screen

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

Table 12. Order Detail Screen, Order

View Icons	Description
Alert	This icon takes you to the Order Alerts Screen screen where you can view the alerts for the order.
Additional Attributes	This icon takes you to the More Order Attributes Screen screen where you can specify additional attributes for Identification, Shipping and Financials.
Order Releases	This icon takes you to the Order Releases for Order Screen screen where you can view the list of order releases based on the release number, ship node and status.
Work Orders	This icon takes you to the Work Orders Screen screen where you can view the related work orders associated with this sales order.
Invoices	This icon takes you to the Order Invoices Screen screen to view the order invoices.
Shipments	This icon takes you to the Order Shipment Items and Containers Screen screen where you can view the shipment and container details.
Instructions	This icon lets you view the Order Instructions Screen screen where you can add, modify or delete the instructions for a order.
Notes	This icon lets you view the Notes Screen where you can add the notes for an order. If notes have been added, the **Notes Check** icon is displayed instead.
Address	This icon takes you to the More Order Addresses Screen screen where you can add or modify forwarding address.
Negotiations	Click this icon to go to the Order Negotiations Screen screen to view the list of order negotiations.
Chained Orders	This icon lets you view the Types of Related Orders screen. For example you can view the Return Orders created from the order console by clicking this icon.

Table 12. Order Detail Screen, Order (continued)

Audit	This icon takes you to the Order Audits Screen screen where you can view the list of audits done for that order.
Shipment Data Types	This icon takes you to the Order Dates Screen screen to view the requested, expected and actual date type for the given order.
Return Receipt History	This icon takes you to the Receiving Discrepancies Screen screen where you can record any discrepancies found when receiving an order.
Actions	
Schedule	You can schedule an order using this action. This action takes you to the Using Schedule Order screen where you can provide the necessary information to schedule the order.
Release	You can release an order using this action. This action takes you to the Release Order Screen screen where you can provide information for releasing the order.
View Holds	This action lets you view and manage order holds. For more information refer to View Holds Screen screen for field level descriptions of the screen.
Cancel	This action enables you to cancel the sales order. It pops up a Modification Reason Screen screen to enter the reasons for cancellation.
Confirm	This action lets you confirm the **Draft** orders.
Create Return	This action enables you to create returns for the returnable order lines. This action takes you to the Returnable Order Lines Screen screen to create a return.
Unschedule	This action unschedules a scheduled order. Upon selecting this action the screen refreshes and any order line that is in the schedule status in unscheduled. If an order cannot be unscheduled, an error reason is displayed.
Add Delivery Request	This action takes you to the Add Delivery Request Screen screen where you can add the necessary delivery requests that are not associated with a product item.
Associate Delivery Request	This action takes you to the Associate Delivery Request Screen screen where you can associate the necessary delivery requests with a product item.
Add Service Request	This action lets you add stand alone (not associated with order lines) provided service items. Upon clicking this action you are taken to the Service Request Search By Item Screen screen where you can search for service requests to add as a stand alone service.
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.
Copy Order	This action takes you to the Copy Order Screen screen where you can create a copy order for the sales order.
Manage Special Services	This action takes you to the Special Services List screen where you can select special services for the carrier.
Fields	
Enterprise	The Enterprise associated with the order.

Table 12. Order Detail Screen, Order (continued)

Buyer	The Buyer organization that placed the order. This field can be edited if the order is in **Draft Order Created** status. In any other status, click this link to view the Organization Details Screen screen of the buyer.
Seller	The Seller organization that is handling the order. This field can be edited if the order is in **Draft Order Created** status. In any other status, click this link to view the Organization Details Screen screen of the seller.
Order #	The order number.
Status	The current status of the order. Click this link to view the associated Order Status Breakup Screen screen.
Order Date	The date the order was placed.
Order Type	This field can be customized as needed.
Carrier/Service	The carrier (such as UPS) and service (such as Ground or Next Day Air) for the order.
Requested Delivery Date	The date on which the Buyer wants the order to be delivered.
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.
Document Type	The document type associated with the order. For example, Sales Order is a document type.

Table 13. ShipTo

View Icon	Description
Address Details	Choose this icon to view or modify the ShipTo addresses. For more information about the screen that is displayed, see the Modify Ship To Address Screen screen.
Additional 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 **Additional Questions Check** 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 **Permit Questions Check** 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.
The name and address of the person or organization where the order is shipped.	

Table 14. BillTo

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

Table 15. Order Detail Screen, Charges

View Icon	Description
Charges and Taxes	This icon takes you to the Order Charge and Tax Summary Screen screen to view the summary of the order charges, discounts 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 Discount	The total Discount amount that is being applied to the order.
Grand Total	The final total, including all extra charges, taxes, and discounts.

Table 16. Order Detail Screen, Payment Info

View Icons	Description
Payment Types	This icon takes you to the Order Payment Information Screen screen where you can view the payment information for the selected payment rule. You can also add or create payment types, debit or credit memos in this screen.
Payment Collection	This icon takes you to the Order Collection Details Screen screen where you can view the collection details for the order.
Fields	
Status	The order's payment status.
Type	The Buyer's payment type, for example, credit card. If multiple payment types exist for the order, the word MULTIPLE is displayed.
Authorized	The amount of credit that has been authorized.
Collected	The amount of credit that has been collected.

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

Table 17. Order Detail Screen, Order Lines

View Icons	Description
Add Provided Service	**Line has Service Requests that can be added** - This icon identifies an order line that can be associated with one or more provided service requests. By clicking this icon, you can associate a provided service request with the order. For more information, refer to Add Service Requests Screen.

Table 17. Order Detail Screen, Order Lines (continued)

Provided Item	**Line Has Associated Service Request** - This icon identifies an order line that has one or more service requests associated with it. By clicking this icon, you can view the provided service requests associated with the order. For more information, refer to Associated Service Requests Screen.
Delivery Item	**Delivery Request needs to be added** - This icon identifies an order line that must be associated with a delivery request. By clicking this icon, you can view the delivery service requests that can be associated with the order. For more information, refer to Associate Delivery Request Screen.
Work Orders	**View Work Orders** - This icon identifies an order 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.
Chained Orders	**Related Lines** - This icon identifies an order line that is related to one or more other order lines. By clicking this icon, you can view the associated related order line's related order lines. For more information, refer to Viewing an Order Line's Chained Order Lines.
Gift	**This is a Gift Line** - This icon identifies an order line that is a gift.
Instructions	**Instructions** - This icon identifies an order line that has one or more instructions associated with it. By clicking this icon, you can view the order line's instructions. For more information, refer to Order Line Instructions Screen.
Kit Components	**Kit Components and Bundles** - This icon identifies an order line item that is a kit or a bundle. By clicking this icon, you can view the order line's kit components or bundle components. For more information about kits, see Kit Components Screen. For more information about bundles, see Bundle Components Screen.
Dependent Child	**Dependent Child** - This icon identifies the child order line in an order line dependency. By clicking this icon, you can view the order line's dependency. For more information, refer to View Dependency Screen.
Dependent Parent	**Dependent Parent** - This icon identifies the parent order line in an order line dependency. By clicking this icon, you can view the order line's dependency. For more information, refer to View Dependency Screen.
Actions	
View Details	This action takes you to the Order Line Detail Screen screen for the selected order lines.
View Instructions	This action takes you to the Order Line Instructions Screen screen to view the instructions for each order line.
View Kit Components	This action takes you to the Kit Components Screen screen where you can view the kits that are associated with the product line.
View Audits	This action takes you to the Order Line Audits Screen screen which stores the audit information for the selected order line.
Line Availability	This action takes you to the Line Availability Screen screen where you can view the product availability and the expected ship date.

Table 17. Order Detail Screen, Order Lines (continued)

Remove Line	This action lets you remove order lines that are in the **Draft** status. Select the order lines that you want to remove and click this action. An alert screen pops up to confirm the removal of the order line.
Create Dependency	This action lets you create dependency between two order lines. For more information refer to Create Dependency Screen.
Substitute Item	This action takes you to the Item Substitution Screen screen where you can add substitute items for the selected product line.
Unschedule Line	This action unschedules the selected order lines.
Associate Service Requests	This action takes you to the Add Service Requests Screen screen where you can associated service requests for the selected order lines.
View Associated Services	This action takes you to the Associated Service Requests Screen screen where you can view the associated service requests for the selected product lines.
Add Logical Kit	This action lets you add a logical kit line in the order. For more information refer to Add Kit Line Screen screen.
View Availability Notes	This action takes you to the View Availability Notes Screen screen.
Fields	
Line	The order line number.
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.
Recv Node	The node that is receiving the order line.
Ship Node	The node that is shipping the order line.
Delivery Date	The date by which the item should be delivered.
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.
Amount	The amount the Buyer is charged for the line.
Status	The current status of the order line.

You can view the service and delivery requests associated with the product line in this screen. The view icons shown in the Order Detail Screen, Service Requests and the Order Detail Screen, Delivery Request tables appear along side of each service request before the line number.

Table 18. Order Detail Screen, Service Requests

View Icons	Description
Work Orders	**View Work Orders** - This icon identifies the work orders associated with the service request. For more information, refer to Work Order Details.

Table 18. Order Detail Screen, Service Requests (continued)

Instructions	**Instructions** - This icon identifies one or more instructions associated with the service request. For more information, refer to Service Request Instructions Screen.
Chained Orders	**Related Lines** - This icon lets you view the Types of Related Orders screen. For example you can view the Return Orders created from the order console by clicking this icon.
Actions	
View Details	This action takes you to the Service Request Details Screen screen for the selected service request.
View Instructions	This screen takes you to the Service Request Instructions Screen screen where you can create, modify or delete instructions for the order.
Cancel	This action lets you cancel the selected service requests. A modification reason screen pops up, after you enter the reason code and press `OK`, the service request is cancelled.
Remove	This action lets you remove service requests when they are in the **Draft** Status.
Fields	
Line	The order's line. Click this link to view the Service Request Details Screen screen.
Item ID	The service item's ID.
Ship Node	The node from which this service is carried out.
Description	The description of the service.
Appointment	The date and time of the service.
Amount	The amount of the service.
Status	The status of the service line. Click this link to view the Service Request Status Breakup Screen screen.
Line Quantity	The quantity used to measure the service. For a service that is not associated to a product, this quantity can be changed by entering a new value and clicking Save.

Table 19. Order Detail Screen, Delivery Request

View Icons	Description
Work Orders	**View Work Orders** - This icon identifies the work orders associated with the delivery request. For more information, refer to Work Order Details.
Instructions	**Instructions** - This icon identifies one or more instructions associated with the delivery request. For more information, refer to Delivery Request Instructions Screen.
Chained Orders	**Related Lines** - This icon lets you view the Types of Related Orders screen. For example you can view the Return Orders created from the order console by clicking this icon.
Actions	
View Details	This action takes you to the Delivery Request Details Screen screen for the selected delivery request.
View Instructions	This screen takes you to the Delivery Request Instructions Screen screen where you can create, modify or delete instructions for the delivery request.

Table 19. Order Detail Screen, Delivery Request (continued)

Cancel	This action lets you cancel the selected delivery requests. A modification reason screen pops up, after you enter the reason code and press `OK`, the delivery request is cancelled.
Add Line	This action takes you to the Additional Product Lines Screen screen where you can associate additional product lines to the delivery service.
Remove	This action lets you remove delivery requests when they are in the **Draft** Status.
Fields	
Line	The order's line. Click this link to view the Delivery Request Details Screen screen.
Item ID	The delivery item's ID.
Ship Node	The node from which this delivery is carried out.
Description	The description of the delivery.
Appointment	The date and time of the delivery.
Line Quantity	The quantity on the delivery line. For a delivery item not associated to a product, this quantity can be changed by entering a new value and clicking Save.
Amount	The amount of the delivery.
Status	The status of the delivery line.

Modify Ship To Address Screen

You can modify the ship to address in this screen.

Table 20. Modify Ship To Address

Fields	Description
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.
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/Region	The country or region 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.

Table 20. Modify Ship To Address (continued)

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.

View Availability Notes Screen

You can view availability notes for an item in this screen.

The order line field descriptions are explained in the Order Line table.

Table 21. View Future Availability Screen, Future Availability

Fields	Description
Future Availability Date	The future date currently displayed. To change this date, enter a new date or select the **Calendar** icon and select a date from the calendar.
Comments	You can view or enter comments in this text area.

Table 22. View Future Availability Notes, Nodes Disabled For Sourcing Or Procurement

Fields	Description
Node	The disabled node.
Suppress Procurement	This field indicates whether the node has been suppressed for Procurement.
Suppress Sourcing	This field indicates whether the node has been suppressed for Sourcing.
Reason Text	The reason why this node has been suppressed for Procurement or Sourcing.

Order Alerts Screen

You can view the alerts associated with an order in this screen.

Table 23. Order

Fields	Description
Enterprise	The Enterprise associated with the order.
Buyer	The Buyer organization that placed the order.
Seller	The Seller organization that is handling the order.
Order #	The order number.
Status	The current status of the order. Click this link to view the associated Order Status Breakup Screen screen.
Order Date	The date the order was placed.

Table 23. Order (continued)

Fields	Description
Order Type	This field can be customized as needed.
Carrier/Service	The carrier (such as UPS) and service (such as Ground or Next Day Air) for the order.
Requested Delivery Date	The date on which the Buyer wants the order to be delivered.
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 24. Order Alerts Screen, Alerts

Actions	Description
View Details	This action takes you to the order alert detail screen where you can view the details of the order alert. For more information about order alerts, see the *Sterling 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.
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.

The alert screen provides information about the various alerts raised for a particular order.

More Order Attributes Screen

You can view additional information related to an order in this screen.

The order header field descriptions are explained in the Order table.

Table 25. More Attributes Screen, Identification

Fields	Description
Enterprise	The Enterprise associated with the order.
Order Name	The name used to identify the order.
Division	This field can be customized as needed.
Requested Cancel Date	The date the customer has requested the order to be canceled by if the order is not fulfilled.
Priority Code	The priority that the Buyer has given to the order.

Table 25. More Attributes Screen, Identification (continued)

Fields	Description
Requested Ship Date	The date by which the customer has requested the order to be shipped.
Scheduling Rule	The scheduling rule that is used when the order is scheduled. For more information about scheduling rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.
Currency	The monetary currency used for the order. A different currency can be selected from the drop-down list if the order is in **Draft Order Created** status. Upon currency change, Sterling Selling and Fulfillment Foundation re-prices the order automatically. Pre-existing charges and taxes, however, are not converted automatically.
Customer PO Number	Enter the customer's purchase to search for orders containing an item that has a specific customer purchase order number, if applicable.

Table 26. More Attributes Screen, Shipping

Fields	Description
Freight Terms	The terms used for calculating transportation costs.
Charge Actual Freight	If the check box is selected, the Buyer is charged exactly what it costs to ship the order. If the check box is not selected, additional charges can be added in addition to the actual cost to ship the order.
Shipping Paid By	The organization that pays for the shipping costs.
Carrier Account #	The Carrier organization's account number with your organization.
Ship Complete	If the check box is selected, the order must be shipped as one complete shipment. If the check box is not selected, the order can be shipped in multiple shipments.
Ship Node	The ship node the order is shipped from.

Table 27. More Attributes Screen, Financials

Fields	Description
Terms Code	The terms code.
Price Program	The price program used for order pricing.
Taxpayer ID	The Buyer's tax payer identification number. This number identifies the organization as a tax paying entity.
Tax Exempt	If the check box is selected, the Buyer is exempt from paying taxes.
Tax Exemption Certificate	The ID of the exemption certificate.
Tax Jurisdiction	The tax jurisdiction that the exemption certificate was issued in.

Table 28. More Attributes Screen, Other Attributes

Fields	Description
Entered By	This field displays the user ID of the user who entered the order.
Source	The method of order entry. For example, web site, kiosk.
Customer ID	The customer's ID.
Notification Type	Indicates the method through which users are notified of special instructions. For example, e-mail.
Notification Reference	A description of the notification.
Vendor ID	The vendor's ID.

Order Releases for Order Screen

You can view the individual releases that have been sent to the nodes scheduled to fulfill an order.

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

Table 29. Order Releases for Order Screen, Order Releases

Actions	Description
View Details	This action takes you to the Order Release Details Screen screen where you can view the details of the order releases.
Fields	
Release #	The release number. Click this link to view the order release details.
Ship Node	The ship node the order has been released to. Click this link to view the Ship Node Detail screen.
Requested Ship Date	The date on which the Buyer wants the order release to be shipped.
Status	The current status of the order release.

Work Orders Screen

You can view the work orders related to the order through the order details screen.

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

The Service Work Orders inner panel provides information about the service work orders that are associated with the order. Please note that this inner panel only if service work orders are associated with this order.

Table 30. Work Orders Screen, Service Work Orders

Actions	Description
View Details	This action takes you to the Work Order Details screen where you can view the details of the selected work orders.
Fields	

Table 30. Work Orders Screen, Service Work Orders (continued)

Work Order #	The work order number. Click this link to view the work order details. Click the Expand All button to show the details for each work order. Click the Collapse All button to hide the details for each work order. Click + or - to show or hide the details for a specific work order.	
Service 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 example, if the service is a provided service, then item group code is `Provided Service`.
	Required Quantity	The quantity of the service items required.
Products being Delivered	Item Related Info	The information related to the service 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.	
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 Service Work Order inner panel provides information about the WMS work orders that are associated with this order. Please note that this inner panel is only be displayed if value-added service work orders are associated with this order.

Table 31. Work Orders Screen, Value-Added Services

Action	**Description**
View Details	This action takes you to the value-added services work order details screen where you can view the details of the selected work orders. For more information about viewing this screen, see the *Sterling Selling and Fulfillment Foundation: Warehouse Management System User Guide*.
Fields	
Work Order #	The work order number associated with the work order. 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.

Table 31. Work Orders Screen, Value-Added Services (continued)

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.

Work Order Audits Screen

You can view audits logged against a work order in the Work Order Audits Screen. An audit is logged against a work order when any type of modification is made to the work order.

You can reference the work order header field descriptions from the following table.

Table 32. Work Order Audits Screen

<table>
<tr><td>Fields</td><td colspan="2">Description</td></tr>
<tr><td rowspan="4">Sequence #</td><td colspan="2">The sequence identification number. Click on the Expand All button to expand the sequence details for each sequence. If you click on the Collapse All button, the sequence details for each sequence are collapsed.</td></tr>
<tr><td>Attribute</td><td>The number associated with attributes of the work order that have been changed.</td></tr>
<tr><td>Old Value</td><td>The previous value of the attribute.</td></tr>
<tr><td>New Value</td><td>The updated value of the attribute.</td></tr>
<tr><td>Audit time</td><td colspan="2">The time at which the audit occurred.</td></tr>
<tr><td>Action</td><td colspan="2">The type of action or modification that was carried out on the work order.</td></tr>
<tr><td>Modified By</td><td colspan="2">The user who performed the modification.</td></tr>
<tr><td>Reason</td><td colspan="2">The reason the modification occurred and any additional information explaining the modification entered by the user.</td></tr>
<tr><td>Comments</td><td colspan="2">Any comments entered by the user regarding the modification.</td></tr>
</table>

Order Invoices Screen

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

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

Table 33. Order Invoices Screen, Invoices

Action	**Description**
View Details	This action takes you to the Invoice Details Screen screen where you can view the invoice summary details.
Fields	
Invoice #	The invoice number for this order. Click this link to view the Invoice Details Screen screen.

Table 33. Order Invoices Screen, Invoices (continued)

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.

Invoice Details Screen

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

Table 34. Invoice

Fields	Description
Order #	The order with which the invoice is associated.
Collected Through AR?	Indicates if the payment was collected through accounts receivable.
Currency	The currency used on the invoice.
Invoice #	The invoice number.
Invoice Type	The type of invoice. For example, shipping invoice, debit invoice, or credit invoice.
Reference	This field can be customized as needed.

The Bill To panel can be used to edit the billing addresses. For more information about the panel details, see Table 14 on page 35.

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

Table 35. Invoice Details Screen, Summary

Fields	Description
Price	The price at the order header and order line levels before any discounts, charges, or taxes have been applied to it.
Discount	Any discounts at the order header and order 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 order header and order line levels.
Taxes	Any additional taxes at the order header and order line levels.
Totals	The total invoice amount at the order header and order line levels after discounts, charges, or taxes have been applied to the original price.

Table 36. Invoice Details Screen, Balance

Field	Description
Invoiced	The total amount of the invoice.

Table 36. Invoice Details Screen, Balance (continued)

Field	Description
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.

The invoice line summary panel provides the line level charges and taxes.

Table 37. Invoice Details Screen, Line Summary

Fields	Description
Line #	The order line number associated with the invoice. Click this link to view the Order Line Detail Screen screen.
Item ID	The item ID associated with the invoice.
PC	The product class associated with the item.
Quantity/UOM	The quantity and unit of measure of the items invoiced.
Unit Price	The unit price of the item.
Extended Price	The extended price of the item.
Charges - Discount	The invoiced charges for the item. Click this link to view the Modifying an Order Line Charge screen.
Taxes	The invoiced taxes for the item. Click this link to view the Invoiced Order Line Taxes Screen screen.
Line Total	The total amount of invoices.

Order Shipment Items and Containers Screen

If an order has been shipped you can view it's shipment details.

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

Table 38. Order Shipment Items and Containers Screen, Shipment Items

Fields	Description
Order #	The order number associated with this shipment.
Order Line	The order line number that is shipped.
Item	The line item that is shipped.
Unit of Measure	The item unit of measure.
Product Class	The item product class.
Actual Ship Date	The date the order line shipped.
Tracking #	The tracking number for the shipped order line.
Carrier/Service	The carrier service used to ship the order line.
Shipment #	The shipment the shipped order line belongs to. Click this link to view the shipment details in the Shipment Details screen.
Shipper's Ref. #	The shipment company's shipment reference identifier.

Table 39. Order Shipments Items and Containers Screen, Shipment Containers

Action	Description
View Details	This action takes you to the Container Details screen of the selected shipments where you can print the carrier labels and void the tracking number.
Fields	
Tracking Number	The tracking number for the container.
Carrier/Service	The carrier service used to ship the container.
Expected Ship Date	The date the container should ship on.
Actual Ship Date	The date the container does ship on.
Ship Node	The node shipping the container.
Recv Node	The node receiving the container.
Shipment #	The shipment the container belongs to. Click this link to view the Shipment Details screen for the selected shipment number.
Status	The container status.

You can also use the Shipments window for:

- Viewing Order Shipments Screen screen - This is a drop-down option in the order shipment items and containers window.

For history orders, all actions on the Order Shipments screen are prevented if the shipments are requested for a history shipment. All actions are allowed if the shipments are from the recent shipment table.

Order Shipments Screen

You can view a more consolidated view of the order shipment information by selecting the drop-down menu next to the displayed screen name.

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

Table 40. Order Shipments Screen, Shipments

Action	Description
View Details	This action takes you to the Shipment Details screen where you can view the details about the selected shipment.
Fields	
Shipment #	The shipment number. Click this link to view the Shipment Details screen.
Shipper's Ref. #	The shipment company's shipment reference identifier.
Expected Ship Date	The date the shipment is expected to ship.
Ship Mode	The ship mode used to ship the order.
Ship Node	The ship node shipping the order.
Recv Node	The node receiving the order.
Status	The shipment status.

Order Instructions Screen

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

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

Table 41. Instructions Window

Action	Description
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 **Instructions URL** icon.

You can also use the Instructions window for:

- Adding an Instruction - Select the **Add** 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 Order Instructions screen can be modified by entering the modified information and selecting `Save`.

Notes Screen

You can add notes to an order by selecting the **Notes** icon in the order header panel of Order Detail Screen screen.

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

Table 42. Notes Screen, Notes

Fields	Description
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.

More Order Addresses Screen

You can view any additional addresses as needed by your business. For more information about defining additional address types, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

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

Table 43. ForwardTo

View Icon	Description
Address Details	**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 order is to be forwarded.	

Order Negotiations Screen

If your business has been set up to have a negotiation process, you can view previous or existing negotiations. The negotiation process can begin at any time within the order pipeline dependent on its configuration. A negotiation always occurs between the order's Buyer (initiator) and Seller (negotiator) organizations. The Buyer and Seller can negotiate various attributes of an order such as price, delivery date, or freight terms.

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

Table 44. Order Negotiations Screen, Negotiation

Fields	Description
Negotiation #	The negotiation number.
Initiator	The organization that made the initial offer.
Negotiator	The organization that can accept, counter-offer, or reject the initiators offer.
Status	The current status of the negotiation. The default negotiation statuses are: • Offered - The last response on the negotiation was from the initiator organization. The initiator can send another offer before the negotiator organization responds to the original offer. • Counter Offered - The last response on the negotiation was from the negotiator organization. The negotiator can send another counter-offer before the initiator organization responds to the original counter-offer. • Completed - The header and line terms on all of the lines have been negotiated by the two organizations. • Published - The negotiated terms have been published and applied to the original document.

You can use the Order Negotiations window for viewing the Order Negotiation Details.

Order Negotiation Details Screen

You can view the negotiation offers and counter offers made between the negotiation initiator and negotiator organizations. You can use this information to make a counter-offer, accept the terms of the negotiations, or cancel the negotiations.

If DEFAULT_QUANTITY has been selected as a Negotiation Rule in the Applications Manager, only the line quantity can be negotiated.

Table 45. Order Negotiation Details Screen, Negotiation

Fields	Description
Order #	The order number the negotiation is being performed against.
Negotiation #	The negotiation number.
Status	The status of the negotiation. The default negotiation statuses are: • Offered - The last response on the negotiation was from the initiator organization. The initiator can send another offer before the negotiator organization responds to the original offer. • Counter Offered - The last response on the negotiation was from the negotiator organization. The negotiator can send another counter-offer before the initiator organization responds to the original counter-offer. • Completed - The header and line terms on all of the lines have been negotiated by the two organizations. • Published - The negotiated terms have been published and applied to the original document.
Enterprise	The Enterprise that owns the negotiating organizations.
Initiator	The organization that made the initial offer.
Negotiator	The organization that counter-offered the initiators offer.

Table 46. Order Negotiation Details Screen, Header

Fields	Description
Last Action By	The organization that performed the last negotiation action.

Table 46. Order Negotiation Details Screen, Header (continued)

Fields	Description
Action	The last negotiation action performed. If you are performing a negotiation, select the appropriate action. The following actions can be performed against a negotiation: • Offer - An offer from the initiator. Only the initiator organization can perform this action. • Counter Offer - A counter offer from the negotiator. Only the negotiator organization perform this action. • Reject - A rejection from the negotiator. Only the negotiator organization can perform this action. • Remove - The initiator wants to remove the line from negotiation. Only the initiator can perform this action. This response is available only at the line level. Once a line is removed, it is assumed that the line has been negotiated and no further negotiation is allowed on that line. • Accept - The sending organization accepts the other organization's terms. Both the initiator and negotiator can perform this action. Once a header or line is accepted, it is assumed that the header or line has been negotiated and no further negotiation is allowed on that header or line.
Attribute	The attribute being negotiated at the header level. For example, freight terms. **Note:** When Counter Offer is selected, the fields become modifiable allowing you to enter your counter offer terms.
Negotiator	The negotiator's offer for a particular attribute.
Initiator	The initiator's offer for a particular attribute.
Response	The counter-offering organizations counter-offer. If you are performing a counter-offer action, select your counter-offer as it pertains to the attribute you are counter-offering.

Table 47. Order Negotiation Details

Fields	Description
Line	The order line being negotiated.
Action	The last negotiation action performed. When performing a negotiation, select the appropriate action for each negotiation line.
Organization Code	The organization code of the organization performing the negotiation action.
Resp #	The response number.
For Resp #	The response number against which the negotiation action was performed.

Table 47. Order Negotiation Details (continued)

Fields	Description
Item ID	The item ID of the negotiated line item. You can modify this field if you are performing a counter-offer, if applicable. **Note:** If DEFAULT_QUANTITY has been selected as a Negotiation Rule in the Applications Manager, this field cannot be modified.
PC	The product class of the negotiated line item. You can modify this field if you are performing a counter-offer, if applicable. **Note:** If DEFAULT_QUANTITY has been selected as a Negotiation Rule in the Applications Manager, this field cannot be modified.
UOM	The unit of measure of the negotiated line item. You can modify this field if you are performing a counter-offer, if applicable. **Note:** If DEFAULT_QUANTITY has been selected as a Negotiation Rule in the Applications Manager, this field cannot be modified.
Freight Terms	The terms used for calculating transportation costs of the negotiation line. You can modify this field if you are performing a counter-offer, if applicable. **Note:** If DEFAULT_QUANTITY has been selected as a Negotiation Rule in the Applications Manager, this field cannot be modified.
Delivery Date	The date by which the order line must be delivered. You can modify this field if you are performing a counter-offer, if applicable. **Note:** If DEFAULT_QUANTITY has been selected as a Negotiation Rule in the Applications Manager, this field cannot be modified.
Price	The price of the order line. You can modify this field if you are performing a counter-offer, if applicable. **Note:** If DEFAULT_QUANTITY has been selected as a Negotiation Rule in the Applications Manager, this field cannot be modified.
Quantity	The quantity of the order line. When counter-offering, you can split a negotiation line in order to negotiate different terms for different quantity of a line. For example, if a negotiation line has the quantity of 10 that was offered with a price of $5.99 and you want to counter-offer a different price for 5 of the line items, you can split this line by choosing the **Add** icon and entering a quantity of 5 with a price of $5.99 and the other quantity of 5 with your desired price.

You can use the Negotiation Details window for viewing an order's negotiation history.

Order Negotiation History Screen

You can view a negotiation's history.

Table 48. Negotiation Details

Field	**Description**
Negotiation	
Order #	The order number the negotiation is being performed against.
Negotiation #	The negotiation number.
Status	The status of the negotiation. The default negotiation statuses are: • Offered - The last response on the negotiation was from the initiator organization. The initiator can send another offer before the negotiator organization responds to the original offer. • Counter Offered - The last response on the negotiation was from the negotiator organization. The negotiator can send another counter-offer before the initiator organization responds to the original counter-offer. • Completed - The header and line terms on all of the lines have been negotiated by the two organizations. • Published - The negotiated terms have been published and applied to the original document.
Enterprise	The Enterprise that owns the negotiating organizations.
Initiator	The organization that made the initial offer.
Negotiator	The organization that counter-offered the initiators offer.
Negotiation Header	
Date	The date the action was performed.
Resp #	The response number.
For Resp #	The response number against which the negotiation action was performed.
Action	The last negotiation action performed.

Table 48. Negotiation Details (continued)

Field	Description
Action	The last negotiation action performed. If you are performing a negotiation, select the appropriate action. The following actions can be performed against a negotiation: • Offer - An offer from the initiator. Only the initiator organization can perform this action. • Counter Offer - A counter offer from the negotiator. Only the negotiator organization perform this action. • Reject - A rejection from the negotiator. Only the negotiator organization can perform this action. • Remove - The initiator wants to remove the line from negotiation. Only the initiator can perform this action. This response is available only at the line level. Once a line is removed, it is assumed that the line has been negotiated and no further negotiation is allowed on that line. • Accept - The sending organization accepts the other organization's terms. Both the initiator and negotiator can perform this action. Once a header or line is accepted, it is assumed that the header or line has been negotiated and no further negotiation is allowed on that header or line.
Freight Terms	The terms used for calculating transportation costs of the negotiation line.
Payment Terms	The payment terms to be used when settling the order.
User	The user that performed the action.
Reason	The reason the action was performed.
Negotiation Lines	
Line #	The order line being negotiated.
Date	The date the action was performed.
Resp #	The response number.
For Resp #	The response number against which the negotiation action was performed.
Action	The last negotiation action performed.
Item ID	The item ID of the negotiated line item.
PC	The product class of the negotiated line item.
UOM	The unit of measure of the negotiated line item.
Freight Terms	The terms used for calculating transportation costs of the negotiation line.
Delivery Date	The date by which the order line must be delivered.
Price	The price of the order line.
Quantity	The quantity of the order line.
User	The user that performed the action.
Reason	The reason the action was performed.

Types of Related Orders

A related order is an order that is either chained to or derived from a different order.

A chained order is linked to a parent order and the lifecycle of one affects the other. For example, if an order is placed with a Seller who must source an item from a ship node that they do not own, the Sales Fulfillment pipeline may be configured to create another "chained" order that differs from the Seller's regular release process. This allows the owner of the ship node to handle the order according to their own business practices while also allowing the original Seller organization to maintain visibility of the order and in turn reflect any changes such as delivery dates and carrier services in the original order.

Note: Chained orders can be created for product items that belong to a delivery request. Chained orders can be created for provided service items and delivery service items.

In some business scenarios, the Seller of the parent order may become the Buyer of the child order. Therefore, the Seller organization associated with the chained order must also be configured as a Buyer organization through the Applications Manager.

A derived order is associated with a parent order and the lifecycle of one does not necessarily impact the other. Examples of a derived order include a return order that is derived from a sales order and an exchange order that is derived from a return order.

Related Orders Screen

Table 49. Related Orders Screen, Related Order Lines

<table>
<tr><th>Action</th><th colspan="2">Description</th></tr>
<tr><td>View Details</td><td colspan="2">This action takes you to the details screen for the selected orders. For example, if you have a return order related to this order line, you can view the return order details.</td></tr>
<tr><td colspan="3">Fields</td></tr>
<tr><td rowspan="9">Order #</td><td colspan="2">The related order number. Click this link to view the order details. For more information, refer to the Sterling Selling and Fulfillment Foundation: Reverse Logistics User Guide or the Sterling Selling and Fulfillment Foundation: Supply Collaboration User Guide.

Click the expand button to view the related order lines.</td></tr>
<tr><td>Line #</td><td>The related order line number.</td></tr>
<tr><td>Item ID Description</td><td>The item ID and its description.</td></tr>
<tr><td>Product Class</td><td>The item's product class</td></tr>
<tr><td>UOM</td><td>The items unit of measure.</td></tr>
<tr><td>Reason Code</td><td>The reason code for return.</td></tr>
<tr><td>Quantity</td><td>The quantity of items to be returned.</td></tr>
<tr><td>Amount</td><td>The total amount.</td></tr>
<tr><td>Status</td><td>The status of the return line.</td></tr>
<tr><td>Relationship</td><td colspan="2">The relationship of the related order with the sales order.</td></tr>
</table>

Table 49. Related Orders Screen, Related Order Lines (continued)

Status	The status of the related order line. For example, for return orders, this link takes you to the related order status breakup. For more information, refer to the *Sterling Selling and Fulfillment Foundation: Reverse Logistics User Guide* or the *Sterling Selling and Fulfillment Foundation: Supply Collaboration User Guide*.
Buyer	The Buyer organization of the order.
Seller	The Seller organization of the order.

Order Audits Screen

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

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

Table 50. Order Audits Screen, Audits

<table>
<tr><th>Action</th><th colspan="2">Description</th></tr>
<tr><td>View Details</td><td colspan="2">This action takes you to the Order Audit Details Screen screen for the selected audits.</td></tr>
<tr><td colspan="3">Fields</td></tr>
<tr><td rowspan="5">Audit #</td><td colspan="2">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.</td></tr>
<tr><td>Detail #</td><td>The audit details identification number. Click this link to go to the Order Audit Details Screen screen.</td></tr>
<tr><td>Order Line Related Info</td><td>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 Order Line Detail Screen screen.</td></tr>
<tr><td>Modification Level</td><td>The level of modification for the corresponding audit detail such as header or line.</td></tr>
<tr><td>Modification Type</td><td>The type of modification, such as change payment status or change carrier, for the corresponding audit detail.</td></tr>
<tr><td>Date</td><td colspan="2">The date and time the modification was carried out.</td></tr>
<tr><td>Modified By</td><td colspan="2">The user that performed the modification.</td></tr>
<tr><td>Reason</td><td colspan="2">The reason the modification occurred and any additional information explaining the modification entered by the user.</td></tr>
<tr><td>Modification Levels</td><td colspan="2">A comma separated list of all levels of modification for the audit.</td></tr>
<tr><td>Modification Types</td><td colspan="2">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.</td></tr>
</table>

Order Audit Details Screen

You can view more details of an order's audit.

Table 51. Order Audit Details Screen, Order Audit

Fields	Description
Order #	The order number the modification was performed on.
Enterprise Code	The Enterprise that owns the order.
Audit Date	The date the audit was created.
Modification Level	The level the order was modified at. For example, order or order LINE.
Line #	The line number associated with the audit.
Item ID	The item ID for which the audit was made.
Unit of Measure	The unit of measure for the audited item.
Product Class	The item ID's product class.
Description	The description of the item that is being audited.
Modification Type	The type of modification performed on the order.
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 order audit.
Reference #2	Reference information about the order audit.
Reference #3	Reference information about the order audit.
Reference #4	Reference information about the order audit.

Table 52. Order Audit Details Screen, Order Audit Details

Fields	Description
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.

Order Dates Screen

You can view any custom dates that have been configured for monitoring. For more information about monitoring, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

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

Table 53. Order Dates Screen, New Date

Fields	Description
Date Type	The custom date type.

Table 53. Order Dates Screen, New Date (continued)

Fields	Description
Requested	The date this date type has been requested to be met.
Expected	The date this date type is expected to be met.
Actual	The date this date type is to be met.

Receiving Discrepancies Screen

You can record any discrepancies found when receiving an order. For example, if you discover broken items, overages, or shortages, you can account for those discrepancies and categorize those situations.

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

Table 54. Manage Order Receiving Discrepancies

Fields	Description
Shipment #	The shipment number associated with the discrepancy.
Line	The line associated with the discrepancy.
Item ID	The item ID associated with the discrepancy.
Product Class	The product class associated with the discrepancy.
Unit of Measure	The unit of measure associated with the discrepancy.
Discrepancy Type	The type of discrepancy, for example, shortage.
Discrepancy Quantity	The quantity of the line's discrepancy.
Discrepancy Reason	The reason for the discrepancy. If multiple reasons are applicable for a single line, the line can be split.
Reason Quantity	The quantity associated with the Discrepancy Reason. The sum of the Reason Quantity entries should equal the value of the Discrepancy Quantity.

Using Schedule Order

Order scheduling indicates that a node or nodes have sufficient inventory to fulfill an order. Once an order is scheduled it can be released to the applicable node or nodes. A scheduling rule determines the node or nodes that the order can be scheduled with based on inventory availability and node preferences. For more information about scheduling rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

While performing this action from the Order Console, you can select a scheduling rule. This function can only be performed if the payment status of the order is 'Not Applicable' or 'Authorized'. You can also choose to release the order immediately after scheduling it. If you do so, you can also choose to override the release date of the order if you want to release it at that moment, regardless of the calculated release date.

For example, an order is using a scheduling rule that schedules the ordered item to a node 100 miles from the ship to address. However, a new node has been added to your Enterprise that supplies the order line items and is only 50 miles away from the ship to address. A new scheduling rule has been created for this node.

You may decide that the order should be shipped from a shorter distance and change to the scheduling rule for the new node.

Note: If you face problems while creating a work order for MTC, verify that the following configuration settings are set up in the Applications Manager:

- In Catalog Management, ensure that the VAS Compliance Service item with service activities is configured.
- In IBM® Sterling Application Platform, ensure that the attribute "Requires VAS Compliance" for Buyer Organization is enabled, and the Compliance Service is configured with required item classification and run quantity.
- In IBM Sterling Warehouse Management System, ensure that the retrieval strategy is configured for locations associated with VAS activities.

Schedule Order Screen

The Schedule Order screen allows you to select a scheduling rule for nodes.

Table 55. Schedule Order Screen, Schedule Information

Fields	Description
Scheduling Rule	Select the scheduling rule you want to use to schedule the order.
Release Immediately	Check Release Immediately to automatically release the order to the scheduled node or nodes. If you do not check Release Immediately, you can manually release the order later or allow it to be released via the regular release agent.
Override Release Date	Check Override Release Date if you want the current release date to be overridden by the date calculated by the rule you have selected.

Choose `OK` to schedule the order.

Release Order Screen

Once an order has been scheduled to a specific node, you can release the order to that node. When you release an order, all of the necessary information (such as ship to address, line item quantity, and carrier service to be used) is sent to the node. Depending on the pipeline, the information may be sent as a release or as a chained order.

Table 56. Release Order Screen, Release Information

Fields	Description
Scheduling Rule	Select the scheduling rule you want to use to schedule the order.
Override Release Date	Check Override Release Date if you want the current release date to be overridden by the date calculated by the rule you have selected.

Choose `OK` to release the order.

View Holds Screen

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 an order on a particular hold type. Additionally, hold types can be configured to be applied automatically, for instance on order creation, or upon resolution of another hold. For more information about defining and configuring hold types, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

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

Table 57. View Holds Screen, Order Holds

View Icons	Description
View History	This icon takes you to the View History Screen screen, where you can view the hold's history.
Action	
Add Holds	This action takes you to the Add Holds Screen screen, where you can add holds to an order.
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 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 58. View Holds Screen, Resolved Holds

View Icons	Description
View History	This icon takes you to the View History Screen 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.

Add Holds Screen

You can add a hold to an order, if that hold is not already being applied to the 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 order, and further status modifications are added on to that history.

Table 59. Add Holds Screen, Order Holds

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

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

View History Screen

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

The primary information header field descriptions can be referred from the Order table.

Table 60. View History Screen, Order Holds

Fields	Description
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.

Returnable Order Lines Screen

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

Table 61. Returnable Order Lines Screen, Return

Fields	Description
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.
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.

Table 61. Returnable Order Lines Screen, Return (continued)

Fields	Description
Return By Gift Recipient	Check this if items are being returned by the gift recipient of the original order.

Table 62. Returnable Order Lines Screen, Returnable Order Lines

Fields	Description
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.
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.

After entering the information in the fields, click `Save` to create a return order.

Associate Delivery Request Screen

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

Typically, in the Application Console, items that have an associated delivery service are indicated by a **Delivery Item** icon.

Note: Delivery lines cannot be split. However, you can split a product line that has associated delivery service, which results in the following recalulations:
- Delivery line quantity
- Pricing
- Capacity requirements for the delivery line

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

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

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

Table 63. Add Delivery Request Screen, Delivery Request

<table>
<tr><th>Fields</th><th colspan="2">Description</th></tr>
<tr><td>Line</td><td colspan="2">The product item's line number on the order.</td></tr>
<tr><td>Item ID</td><td colspan="2">The product item's ID.</td></tr>
<tr><td>PC</td><td colspan="2">The product item's product class.</td></tr>
<tr><td>UOM</td><td colspan="2">The unit of measure for the delivery service.</td></tr>
<tr><td>Description</td><td colspan="2">Displays the description of the delivery service.</td></tr>
<tr><td>Delivery Request Description</td><td colspan="2">Choose the radio button in the column heading and the specific radio button for the applicable item.</td></tr>
<tr><td rowspan="5">Options Table</td><td colspan="2">The Options table displays only when a delivery service has any optional services available, such as clean up or old appliance removal.</td></tr>
<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 delivery service option.</td></tr>
<tr><td>Description</td><td>Displays the short description of the delivery service option.</td></tr>
<tr><td>Price</td><td>Displays the price of the delivery service option.</td></tr>
</table>

Add Delivery Request Screen

You can add a delivery request that does not require product association.

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

Table 64. Add Delivery Request Screen, Delivery Request

<table>
<tr><th>Actions</th><th>Description</th></tr>
<tr><td>Add to Order</td><td>Check a delivery item listed and select this action to add the item to the order.

This takes you to the Delivery Request Details Screen screen.</td></tr>
<tr><td colspan="2">Fields</td></tr>
<tr><td>Item ID</td><td>The delivery item.</td></tr>
<tr><td>UOM</td><td>The unit of measure for the delivery item.</td></tr>
<tr><td>Short Description</td><td>The short description of the delivery item.</td></tr>
</table>

Work Order Entry Screen

You can create a work order from an order if it contains a Provided or Delivery Service line. Choose `Create Work Order` from the Order Detail Screen screen.

Table 65. Work Order Entry Screen, Header Details

Fields	Description
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 66. Work Order Entry Screen, Provided Services

Fields	Description
Line	The order line number.
Item ID	The ID of the provided service item.
Description	The description of the provided service item.
Ship Node	The node from which the resource is originating.
Line Qty	The quantity of work required to complete the provided service line.

Table 67. Work Order Entry Screen, Delivery Services

Fields	Description
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 68. Work Order Entry Screen, Products Being Delivered

Fields	Description
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.
Ship Date	The requested ship date of the product on the order line.
Delivery Date	The requested delivery date of the product on the order line.
Required Quantity	The quantity of the product being delivered.

Copy Order Screen

You can copy an order through the order details screen. The new order is copied into the `Draft Order Created` status.

Table 69. Copy Order

Fields	Description
Copy From Order #	The number of the order that is being copied
Document Type	The document type of this order.
Enterprise	The enterprise associated with the order.
Buyer	The buyer organization that placed the order.
Seller	The seller organization that is handling the order.
Order #	The number of the new order.
Order Name	The name of the new order.
Order Date	The date for the new order.

The only editable fields on this screen are Order #, Order Name and Order Date. All other fields displayed cannot be modified.

Order Status Breakup Screen

The status breakup enables you to view the status of an order. An order can be in multiple statuses at the same time. For example, one order line can be in Sent to Node status while another order line is in the Backordered status. You can view the order status breakup screen by viewing the hyperlink in the Status field of the Order Detail Screen screen.

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

Table 70. Order Status Breakup Screen, Order Lines By Status

Fields	Description
Line	the order line number.
Release #	The order line release number, if the order line has been released to a node.
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.
Ship Node	The node that is shipping the order line.
Procure From Node	The node that the item is being procured from.
Last Changed On	The date the line last had a status change.
Status	The current status for that part of the order line.
Quantity	The quantity of the line item ordered.

Table 70. Order Status Breakup Screen, Order Lines By Status (continued)

Fields	Description
Tag #	The tag number with which the order line is associated. Click the hyperlink to view the tag number details. **Note:** This field is only applicable if the item is tag controlled.
ETS	The estimated time of shipment. To modify, enter the quantity you want to change the estimated time of shipment of in the Quantity field and the new estimated time of shipment in the ETS field.

Table 71. Order Status Breakup Screen, Service Requests Status

Fields	Description
Line	The line associated with the service request.
Release #	The release number associated with the service request.
Item ID	The item ID associated with the service request.
UOM	The unit of measure associated with the service request.
Ship Node	The ship node associated with the service request.
Last Changed On	The last changed on date associated with the service request.
Status	The status associated with the service request.
Quantity	The status of the quantity associated with the service request.
Appointment Date	The status of the appointment date associated with the service request.

Table 72. Order Status Breakup Screen, Delivery Requests By Status

Fields	Description
Line	The line associated with the delivery request.
Item ID	The item ID associated with the delivery request.
UOM	The unit of measure associated with the delivery request.
Ship Node	The ship node associated with the delivery request.
Last Changed On	The last changed on date associated with the delivery request.
Status	The status associated with the delivery request.
Quantity	The status of the quantity associated with the delivery request.
Appointment Date	The status of the appointment date associated with the delivery request.

Order's Tag Number Details Window

The tag number of an item is the combination of its three tag identifiers: lot number, batch number, and revision number. For more information about tag numbers, see the *Sterling Selling and Fulfillment Foundation: Catalog Management Concepts Guide*.

You can view the tag number details by clicking the Tag # hyperlink in the Order Status Breakup Screen screen. The Tag Number Details window appears.

Table 73. Tag Number Details

Fields	Description
Lot #	The item's lot number. **Note:** This field only appears if a lot number has been set for this item.
Batch #	The item's batch number. **Note:** This field only appears if a batch number has been set for this item.
Revision #	The item's revision number. **Note:** This field only appears if a revision number has been set for this item.

Modifying an Order's Carrier and Carrier Service

A Carrier is an organization that provides carrier services between buyers, sellers, and customers. Services, such as Next Day Air, can be offered dependent on the Carrier. For example, UPS, Federal Express®, and the United States Postal Service are all Carrier organizations.

You may want to change Carrier or service details. For example, an order may be associated with a Carrier that only provides Ground delivery. The customer decides that they need to have the order delivered as soon as possible. You may decide to change to a Carrier that provides Next Day Air service.

You can modify an order's carrier and carrier service from the Order Detail Screen screen and make any modification to the Carrier/Service field. Then save your changes. The Modification Reason window appears. Enter the reason code and text and choose `OK`.

Order Charge and Tax Summary Screen

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

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

Note: This window displays all order charges and discount charges against the order header.

Table 74. Order Charge and Tax Summary Screen, Summary

Fields	Description
Summary	The summary panel provides the price, discount, charges and taxes for an order and the order line. You can view all of the charges that exist against an order by selecting Overall. You can view only the charges that are still open against the order by selecting Open. You can view only the charges that have been invoiced for the order 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.
Discount	Any Discount at the header and line levels. Click the link under the `Header` level row to view the order 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.
Charges	Any additional charges at the header and line levels. Click the link under the `Header` level row to view the order 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 order 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.

Table 75. Order Charge and Tax Summary Screen, Line Summary

Fields	Description
Line #	The line number. Click this link to view the Order Line Detail Screen 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 ordered.
Unit Price	The price of the line item.
Extended Price	The extended price represents the total of quantity multiplied by the unit price.
Discount	The discount price applied to the associated line. Click the hyperlink to view the Overall Order Line Charges Screen, Remaining Order Line Charges Screen and Modifying an Order Line Charge.

Table 75. Order Charge and Tax Summary Screen, Line Summary (continued)

Fields	Description
Charges	The total charges applied the associated line. Click the hyperlink to view the Overall Order Line Charges Screen, Remaining Order Line Charges Screen and Modifying an Order Line Charge.
Tax	The total taxes applied to the order line. Click the hyperlink to view the Overall Order Line Taxes Screen, Remaining Order Line Taxes Screen and Invoiced Order Line Taxes Screen.
Line Total	The total cost of the order line after any additional charges, taxes, and discounts have been applied.

Table 76. Order Charge and Tax Summary Screen, Service Request or Delivery Request Summary

Fields	Description
Line Number	The service or delivery request's line number. Click this link to view the Service Request Details Screen screen, or Delivery Request Details Screen 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.
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 Remaining Order Line Charges Screen screen.
Charges	The service or delivery request's charges. Click this link to view the Remaining Order Line Charges Screen screen.
Taxes	The service or delivery request's taxes. Click this link to view the Remaining Order Line Taxes Screen screen.
Line Total	The service or delivery request's line grand total charges.

Overall Order Charges Screen

You can view the header level charges of an order.

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

Table 77. Overall Order Charges Screen, Charges

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

Overall Order Taxes Screen

You can view the header level tax information associated with an order.

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

Table 78. Overall Order Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category with which the tax is associated. **Important:** An order header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An order header level tax cannot be applied to a price value.
Charge Name	The charge name with which the tax is associated. **Important:** An order header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An order 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.

Remaining Order Charges Screen

You can use the Remaining Order Charges Detail window for adding or modifying the order charges.

- **Adding Remaining Order Charges** - From the Charges table, choose the **Add** icon. 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 order charges and discount charges. Consult your system administrator to determine which charges should be used as order charges and which should be used as discount charges.

Table 79. Remaining Order Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category. Select an option from the drop-down menu.
Charge Name	The name of the charge name. Once the charge category is selected, this field is populated by a drop-down menu. Select the appropriate charge name.
Charge Amount	The amount of the charge that is applied to the header level.

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

- **Modifying Remaining Order 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 screen appears, enter the appropriate reason code and text and click `OK`.

Remaining Order Taxes Screen

You can use the Remaining Order Taxes window for adding or modifying the order taxes.

- **Adding Remaining Order Taxes** - From the Taxes panel, choose the **Add** icon. 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.

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

Table 80. Remaining Order Taxes Screen, Taxes

Fields	Description
Charge Category	The name of the charge category. Select an option from the drop-down menu.
Charge Name	The name of the charge name. Once the charge category is selected, this field is populated by a drop-down menu. Select the appropriate charge name.
Charge Amount	The amount of the charge that is applied to the header level.
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.

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

- **Modifying Remaining Order 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 screen appears, enter the appropriate reason code and text and click `OK`.

Modifying an Invoiced Order Charge

About this task

You can view the invoice level charges of an order.

Note: This window displays all order charges and discount charges against the order header.

Order

If you want to modify a order charge after the invoice is created, you need to complete the following steps:

Procedure

1. Check to see if the "Apply Price Change To Invoiced Quantity" is selected in the sales order financial attributes in the Applications Manager.
2. In the Order details, enter the total amount of the charge and not just the difference.

Results

The above steps are necessary if you want to make modifications after an invoice has been created for the charges and taxes from the "Order Detail Screen" and the "Order Line Detail Screen" screens.

The order header field descriptions can be referred from the Order table. If you view the invoiced order charges from the Order Invoices Screen screen the order header panel is replaced with fields described in the Invoice table.

Invoiced Order Charges Screen

The Invoiced Order Charges screen allows you to view invoiced order charges.

Table 81. Invoiced Order Charges Screen, Charges

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

Invoiced Order Taxes Screen

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

The order header field descriptions can be referred from the Order table. If you view the invoiced order taxes screen from the Order Invoices Screen screen the order header panel is replaced with the fields described in the Invoice table.

Table 82. Invoiced Order Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category with which the tax is associated. **Important:** An order header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An order header level tax cannot be applied to a price value.
Charge Name	The charge name with which the tax is associated. **Important:** An order header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An order 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.

Table 82. Invoiced Order Taxes Screen, Taxes (continued)

Fields	Description
Tax Amount	The amount of the tax that is applied to the header level.

Order Payment Information Screen

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

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

- Awaiting Authorization - Sterling Selling and Fulfillment Foundation is waiting for a third-party payment processing application to authorize the Buyer's payment method before the order can move any further through the pipeline.
- Awaiting Payment Information - Sterling Selling and Fulfillment Foundation is waiting for a third-party payment processing application to receive the Buyer's payment information before the order can be authorized.
- Authorized - The third party payment processing application has authorized the Buyer's payment method and the order continues through the pipeline.
- Authorization Failed - The third party payment processing application did not authorize the Buyer's payment method and manual intervention is required.
- 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 order must be put on hold until a payment issue is resolved.
- Paid - The settlement has been received and the order can be closed.
- Not Applicable - Payment status is not applicable. For example, if the order is a draft order.

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

Table 83. Order Payment Information Screen, Payment Information

Actions	Description
Add Payment Type	This action takes you to the Add Order Payment Information Screen screen.
Create Credit Memo	This action takes you to the Create Credit Memo Screen screen where you can create credit memos for the payment types.
Create Debit Memo	This action takes you to the Create Debit Memo Screen screen where you can create debit memos for the payment types.
View Collection Details	This action lets you view the Order Collection Details Screen screen where you can view the collection details for the order.
Fields	
Payment Rule	The payment rule used for invoicing, settlement, and collection. For more information about payment rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.
Total Adjustments	The total adjustments made to the amount after credits and debits have been taken into consideration.

Table 83. Order Payment Information Screen, Payment Information (continued)

Total Collected	The total amount of the order that has been collected.
Open Authorized	The amount that has been authorized.
Total Refunded	The total amount of the order that has been refunded.
Total Cancelled	The total amount of the order that has been cancelled as a result of cancelling the order 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 84. Order Payment Information Screen, Credit Card

View Icons	**Description**
Address Details	**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.
Actions	
Modify	If the payment method is incomplete, this action lets you modify payment information in the Modify Order Payment Information screen.
Charge	This action lets you charge the payment amount in the Charge Screen screen.
Authorize	This action lets you authorize the payment in the Authorize Screen screen.
Refund	This action lets you refund the amount in the Refund Screen 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.

Table 84. Order Payment Information Screen, Credit Card (continued)

<table>
<tr><td>Charge Sequence</td><td colspan="2">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.</td></tr>
<tr><td>Collected Amount</td><td colspan="2">The amount of the order that has been collected against this payment type.</td></tr>
<tr><td>Refunded Amount</td><td colspan="2">The amount of the order that has been refunded against this payment type.</td></tr>
<tr><td>Credit Card #</td><td colspan="2">The credit card number.
Note: Credit Card numbers are displayed with asterisks (*) for all but the last four digits.</td></tr>
<tr><td>Unlimited Charges</td><td colspan="2">Select Unlimited Charges if the payment type has no charge limit.</td></tr>
<tr><td>Authorized Amount</td><td colspan="2">The amount that has been authorized to collect with this payment type.</td></tr>
<tr><td>Expiration Date</td><td colspan="2">The expiration date on the credit card.</td></tr>
<tr><td>Max Charge Limit</td><td colspan="2">The maximum amount this payment type can be charged.</td></tr>
<tr><td>Awaiting Collections</td><td colspan="2">The amount waiting to be collected against this payment type.</td></tr>
<tr><td>Credit Card Type</td><td colspan="2">The type of credit card, such as VISA or MasterCard.</td></tr>
<tr><td>Awaiting Authorizations</td><td colspan="2">The amount waiting to be authorized.</td></tr>
<tr><td>Name On Card</td><td colspan="2">The name exactly as it appears on the card.</td></tr>
<tr><td rowspan="4">Payment Type Status</td><td colspan="2">This field provides the current status of the payment type.</td></tr>
<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 85. Order Payment Information Screen, Customer Account

<table>
<tr><th>Actions</th><th>Description</th></tr>
<tr><td colspan="2">For the list of actions refer to the Order Payment Information Screen, Credit Card table.</td></tr>
<tr><td colspan="2">Fields</td></tr>
<tr><td>Payment Type</td><td>The payment type. For example, Credit Card or Check.</td></tr>
</table>

Table 85. Order Payment Information Screen, Customer Account (continued)

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 credit 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 order that has been collected against this payment type.
Refunded Amount	The amount of the order that has been refunded against this payment type.
Customer Account #	The Buyer's account number. If encryption is turned on, the Customer Account number field displays asterisks (*) for all but the last four digits, 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 order.
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 #1	This field can be customized as needed. If encryption is turned on, this field displays asterisks (*) for all but 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 Order Payment Information Screen, Credit Card table for the payment type status details.

Table 86. Order Payment Information Screen, Stored Value Card

Actions	Description
For the list of actions refer to the Order 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:** SVC numbers are displayed with asterisks (*) for all but the last four digits.

Table 86. Order Payment Information Screen, Stored Value Card (continued)

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 credit 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 order that has been collected against this payment type.
Refunded Amount	The amount of the order 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 asterisks (*) for all but 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 is 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 Order Payment Information Screen, Credit Card table for the payment type status details.

Table 87. Order Payment Information Screen, Other

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

Table 87. Order Payment Information Screen, Other (continued)

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 credit 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 order 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 asterisks (*) for all but 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 Order Payment Information Screen, Credit Card table for the payment type status details.

Add Order Payment Information Screen

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

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

Table 88. Add Order Payment Information Screen, Credit Card Payment Type

Fields	Description
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.

Table 88. Add Order Payment Information Screen, Credit Card Payment Type (continued)

Fields	Description
Credit Card #	Enter the credit card number. If the yfs.ssdcs.tokenize.cc property is set to Y, the entry field will be served from the IBM Sterling Sensitive Data Capture Server. For information about using the IBM Sterling Sensitive Data Capture Server to tokenize credit card numbers, refer to the *Sterling Selling and Fulfillment Foundation: Sterling Sensitive Data Capture Server, Release 1.1: Configuration Guide*. For information about overriding properties using the `customer_overrides.properties` file, refer to the `Sterling Selling and Fulfillment Foundation: Properties Guide`.
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, see Table 202 on page 148.

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

Table 89. Add Order Payment Information Screen, Customer Account Payment Type

Fields	Description
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 credit cards as 2, you can collect against any gift certificates before the credit card is collected against.
Customer Account #	The Buyer's account number.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Customer PO #	The purchase order number placed for the order.
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 90. Add Order Payment Information Screen, Check or Other Payment Type

Fields	Description
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.
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 91. Add Order Payment Information Screen, Stored Value Card Payment Type

Fields	Description
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.
Stored Value Card #	Enter the stored value card number. If the yfs.ssdcs.tokenize.svc property is set to Y, the entry field will be served from the IBM Sterling Sensitive Data Capture Server. For information about using the IBM Sterling Sensitive Data Capture Server to tokenize stored value card numbers, refer to the *Sterling Selling and Fulfillment Foundation: Sterling Sensitive Data Capture Server, Release 1.1: Configuration Guide*. For information about overriding properties using the `customer_overrides.properties` file, refer to the `Sterling Selling and Fulfillment Foundation: Properties Guide`.
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 Order Payment Information Screen screen is populated with the added payment types.

Modify Order Payment Information Screen

You can modify one or more payment types to collect against an order.

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

Table 92. Modify Order Payment Information Screen, Credit Card Payment Type

Fields	Description
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.
Collected Amount	The amount of the order that has been collected against this payment type.
Credit Card #	Enter the credit card number. If the yfs.ssdcs.tokenize.cc property is set to Y, the entry field will be served from the IBM Sterling Sensitive Data Capture Server. For information about using the IBM Sterling Sensitive Data Capture Server to tokenize credit card numbers, refer to the *Sterling Selling and Fulfillment Foundation: Sterling Sensitive Data Capture Server, Release 1.1: Configuration Guide*. For information about overriding properties using the `customer_overrides.properties` file, refer to the `Sterling Selling and Fulfillment Foundation: Properties Guide`.
Unlimited Charges	Select the Unlimited Charges if the payment type has no charge limit.
Refunded Amount	The amount of the order that has been refunded against this payment type.
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.
Authorized Amount	The amount that has been authorized to collect with this payment type.
Credit Card Type	Enter the type of credit card, such as VISA or MasterCard.
Awaiting Collections	The amount waiting to be collected against this payment type.
Name On Card	Enter the name exactly as it appears on the card.
Awaiting Authorizations	The amount waiting to be authorized.

Table 92. Modify Order Payment Information Screen, Credit Card Payment Type (continued)

Fields	Description	
Payment Type Status	This field provides the current status of the payment type.	
	Suspended for Charge	If selected, payment collections are frozen, but refunds can still be performed for the specified payment type. Reactivate payment collections by choosing Active.
	Suspended for Charge and Refund	If selected, payment collections and refund credits are frozen for the specified payment type. Reactivate payment collections and refunds by choosing Active.
	Active	If selected, payments can be collected and credits can be refunded for the specified payment type.

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

Table 93. Modify Order Payment Information Screen, Customer Account Payment Type

Fields	Description
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 credit cards as 2, you can collect against any gift certificates before the credit card is collected against.
Collected Amount	The amount of the order that has been collected against this payment type.
Customer Account #	The Buyer's account number.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Refunded Amount	The amount of the order that has been refunded against this payment type.
Customer PO #	The purchase order number placed for the order.
Max Charge Limit	Enter the maximum amount that can be charged against this payment type.
Authorized Amount	The amount that has been authorized to collect with this payment type.
Awaiting Collections	The amount waiting to be collected against this payment type.
Awaiting Authorizations	The amount waiting to be authorized.
Payment Reference #1	This field can be customized as needed.
Payment Reference #2	This field can be customized as needed.

Table 93. Modify Order Payment Information Screen, Customer Account Payment Type (continued)

Fields	Description	
Payment Type Status	This field provides the current status of the payment type.	
	Suspended for Charge	If selected, payment collections are frozen, but refunds can still be performed for the specified payment type. Reactivate payment collections by choosing Active.
	Suspended for Charge and Refund	If selected, payment collections and refund credits are frozen for the specified payment type. Reactivate payment collections and refunds by choosing Active.
	Active	If selected, payments can be collected and credits can be refunded for the specified payment type.

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 the same.

Table 94. Modify Order Payment Information Screen, Check or Other Payment Type

Fields	Description
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.
Collected Amount	The amount of the order that has been collected against this payment type.
Payment Reference #1	This field can be customized as needed.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Refunded Amount	The amount of the order that has been refunded against this payment type.
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.
Authorized Amount	The amount that has been authorized to collect with this payment type.
Payment Reference #3	This field can be customized as needed.
Awaiting Collections	The amount waiting to be collected against this payment type.
Awaiting Authorizations	The amount waiting to be authorized.

Table 94. Modify Order Payment Information Screen, Check or Other Payment Type (continued)

Fields	Description	
Payment Type Status	This field provides the current status of the payment type.	
	Suspended for Charge	If selected, payment collections are frozen, but refunds can still be performed for the specified payment type. Reactivate payment collections by choosing Active.
	Suspended for Charge and Refund	If selected, payment collections and refund credits are frozen for the specified payment type. Reactivate payment collections and refunds by choosing Active.
	Active	If selected, payments can be collected and credits can be refunded for the specified payment type.

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

Table 95. Modify Order Payment Information Screen, Stored Value Card Payment Type

Fields	Description
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.
Collected Amount	The amount of the order that has been collected against this payment type.
Stored Value Card #	Enter the stored value card number. If the yfs.ssdcs.tokenize.svc property is set to Y, the entry field will be served from the IBM Sterling Sensitive Data Capture Server. For information about using the IBM Sterling Sensitive Data Capture Server to tokenize stored value card numbers, refer to the *Sterling Selling and Fulfillment Foundation: Sterling Sensitive Data Capture Server, Release 1.1: Configuration Guide*. For information about overriding properties using the `customer_overrides.properties` file, refer to the `Sterling Selling and Fulfillment Foundation: Properties Guide`.
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.
Refunded Amount	The amount of the order that has been refunded against this payment type.
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.
Authorized Amount	The amount that has been authorized to collect with this payment type.

Table 95. Modify Order Payment Information Screen, Stored Value Card Payment Type (continued)

Fields	Description	
Payment Reference #2	This field can be customized as needed.	
Payment Reference #3	This field can be customized as needed.	
Awaiting Collections	The amount waiting to be collected against this payment type.	
Awaiting Authorizations	The amount waiting to be authorized.	
Payment Type Status	This field provides the current status of the payment type.	
	Suspended for Charge	If selected, payment collections are frozen, but refunds can still be performed for the specified payment type. Reactivate payment collections by choosing Active.
	Suspended for Charge and Refund	If selected, payment collections and refund credits are frozen for the specified payment type. Reactivate payment collections and refunds by choosing Active.
	Active	If selected, payments can be collected and credits can be refunded for the specified payment type.

Click `Save` after entering the necessary information for modifying a payment types. The Order Payment Information Screen screen is populated with the added payment types.

Create Credit Memo Screen

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

Table 96. Create Credit Memo Screen, Credit Memo Details

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

Create Debit Memo Screen

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

Table 97. Create Debit Memo Screen, Debit Memo Details

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

Order Collection Details Screen

You can view collection details associated with an order.

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

Table 98. Order Collection Details Screen, Collection Details

Fields	Description
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 order.
Return Invoiced Amount	The amount that has been invoiced for a return charge for an order.
Open Authorized	The amount for which authorizations have been carried out.
Open Order Amount	The amount remaining to be collected on the order.
Total Cancelled	The amount for which cancellation has been done on order lines on an 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. **Note:** This field is only displayed for exchange orders.

Table 99. Order Collection Details Screen, Invoice Collection Information

Fields	Description
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 and Authorization Summary view only the transaction types CHARGE and AUTHORIZED related details would be available. If you want to view the 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 100. Order Collection Details Screen, Collection Summary

Fields	Description
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 order.
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 101. Customer Account Information Expanded

Fields	Description
Payment Type	The payment type.
Customer Account #	The customer account #. If encryption is turned on, this field displays asterisks (*) for all but the last four digits of the Customer Account number, unless you have the necessary permissions.
Customer PO #	The purchase order number placed for the order.
Payment Reference #1	This field can be customized as needed. If encryption is turned on, this field displays asterisks (*) for all but 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 102. Credit Card Information Expanded

Fields	Description
Payment Type	The payment type i.e. credit card.
Credit Card #	The credit card number. This field displays displays asterisks (*) for all but the last four digits of the Credit Card number.
Expiration Date	The expiration date on the credit card. This field may be encrypted.
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. This field may be encrypted.
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.
CVV Authorization Code	CVV Authorization code.

Table 103. Stored Value Card Information Expanded

Fields	Description
Payment Type	The payment type i.e. gift card.
Stored Value Card #	The stored value card number. This field displays asterisks (*) for all but the last four digits of the Stored Value Card number.
Payment Reference #1	This field can be customized as needed. If encryption is turned on, this field displays asterisks (*) for all but 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 104. Payment Type Information Expanded

Fields	Description
Payment Type	The payment type i.e. check.

Table 104. Payment Type Information Expanded (continued)

Fields	Description
Payment Reference #1	This field can be customized as needed. If encryption is turned on, this field displays asterisks (*) for all but 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.

Charge Screen

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

Table 105. Charge

Fields	Description
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.

Authorize Screen

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

Table 106. Authorize

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

Refund Screen

If the payment rule you are using against this order requires authorization, you can manually refund an amount to be collected with a particular payment type.

Table 107. Refund

Fields	Description
Authorization ID	Enter the authorization ID for the refund.
Code	Enter a code for the refund.
Expiration Date	Enter the expiration date for the refund.
Amount	Enter the amount being refunded.

Order Line Search By Status Screen

You can search for order lines based on the order line status.

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 108. Order Line Search By Status

Fields	Description
Order Number	Enter the order number of the order line you are searching for, if applicable.
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Buyer	Enter the Buyer of the order lines you want to search for, if applicable.
Seller	Enter the Seller of the order lines you want to search for, if applicable.
Buyer Account Number	Enter a Buyer account number to search for order lines of a draft order containing a particular Buyer account number, if applicable.
Order Line Status	Select the status range of the order lines you want to search for, if applicable.
Payment Status	Select the payment status the order lines you are searching for are in, if applicable.
Held Orders	Select this if the order lines you are searching for are being held.
Hold Type	If you selected Held Orders, select the hold type with which the orders you are searching for are associated.

Table 108. Order Line Search By Status (continued)

Fields	Description
Max Records	Enter the maximum number of order lines you want returned from your search.

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

Order Line Search By Item Screen

You can search for order lines based on the available item information.

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 109. Order Line Search By Item

Fields	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	Enter the order number of the order line you are searching for, if applicable.
Buyer	Enter the Buyer of the order lines you want to search for, if applicable.
Seller	Enter the Seller of the order lines you want to search for, if applicable.
Item ID	Enter the item ID to search for order lines containing a specific item, if applicable.
Product Class	Select an item product class to search for order lines containing an item that has a specific product class, if applicable.
UOM	Select an item unit of measure to search for order lines containing an item that has a specific unit of measure, if applicable.
Item Description	Enter the item description you want the order lines you are searching for to be associated with, if applicable.
Customer Item ID	Enter the customer's item ID to search for order lines containing an item that has a specific customer item ID, if applicable.
Customer PO Number	Enter the customer's purchase to search for order lines containing an item that has a specific customer purchase order number, if applicable.
Max Records	Enter the maximum number of order lines you want returned from your search.

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

Order Line Search By Date Screen

You can search for order lines based on the order line creation, shipping dates information.

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 110. Order Line Search By Date

Fields	**Description**
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	Enter the order number of the order line you are searching for, if applicable.
Buyer	Enter the Buyer of the order lines you want to search for, if applicable.
Seller	Enter the Seller of the order lines you want to search for, if applicable.
Buyer Account Number	Enter the Buyer's account number with the order lines you want to search for, if applicable.
Order Date	Enter the order date range through which you want to search for order lines, if applicable.
Requested Ship Date	Enter the requested shipping date range through which you want to search for order lines, if applicable.
Requested Delivery Date	Enter the requested delivery date range through which you want to search for order lines, if applicable.
Max Records	Enter the maximum number of order lines you want returned from your search.

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

Order Line Search By Draft Orders Screen

You can search for order lines which are in the draft status in this screen.

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 111. Order Line Search By Draft Orders

Fields	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	Enter the order number of the draft order you are searching for, if applicable.
Buyer	Enter the Buyer of the order lines you want to search for, if applicable.
Seller	Enter the Seller of the order lines you want to search for, if applicable.
Buyer Account Number	Enter a Buyer account number to search for order lines of a draft order containing a particular Buyer account number, if applicable.
Max Records	Enter the maximum amount of order lines you want returned from your search.

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

Order Line List Screen

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

Table 112. Order Line List

Actions	Description
View Details	This action takes you to the Order Line Detail Screen screen where you can view the details for the selected order lines.
View Releases	This action takes you to the Order Releases for Order Line Screen screen where you can view the releases for the order line.
View Instructions	This action lets you view the Order Line Instructions Screen screen where you can create, modify or delete the order line instructions.
View Kit Components	This action lets you view the Kit Components Screen screen.
View More Addresses	This action lets you view the More Order Line Addresses Screen screen.
View Work Orders	This action takes you to the Work Orders Screen screen where you can view the related work orders.

Table 112. Order Line List (continued)

View Audits	This action takes you to the Order Line Audits Screen screen where you can view the audits of individual lines.
Unschedule Line	This action unschedules the selected order lines.
View Future Availability	This action takes you to the View Availability Notes Screen screen.
Fields	
Order #	The unique identifier of the order.
Line #	The line number of the order. Click this link to view the Order Line Detail Screen screen.
Item ID	The product item's ID.
PC	The item's product class.
UOM	The item's unit of measure.
Item Description	The item's description
Recv Node	The destination node name.
Ship Node	The shipping node name.
Line Qty	The quantity used to measure the service.
Amount	The total amount charged for the order line.
Status	The status of the order line.

Order Line Detail Screen

Table 113. Order Line Details Screen, Order Line

View Icons	Description
Order Releases	This icon takes you to the Order Releases for Order Line Screen 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 Order Line Instructions Screen screen where you can add, modify or delete the instructions for a order line.
Kit Components	This icon takes you to the Kit Components Screen where you can view the kit components associated with the order line.
Address	This icon takes you to the More Order Line Addresses Screen screen where you can add or modify forwarding address.
Chained Orders	This icon lets you view the Viewing an Order Line's Chained Order Lines screen. For example you can view the Return Orders created from the order console by clicking this icon.
Additional Attributes	This icon takes you to the Item Attributes Screen screen where you can specify additional attributes for item and delivery.
Shipment Data Types	This icon takes you to the Order Line Dates Screen screen to view the requested, expected and actual date type for the given order line.
Inventory Information	This icon takes you to the Inventory Information Screen screen where you can enter the tag identifiers and tag attributes for the order line.

Table 113. Order Line Details Screen, Order Line (continued)

Provided Item	This icon takes you to the Associated Service Requests Screen screen where you can view or cancel the services associated with this order line.
Work Orders	This icon takes you to the Work Orders Screen screen where you can view the related work orders associated with this order line.
Audit	This icon takes you to the Order Line Audits Screen screen where you can view the list of audits done for that order line.
Actions	
Unschedule Line	This action unschedules the order line.
Add Service Requests	The action takes you to the Add Service Requests Screen screen where you can add any service requests associated with this product line.
Line Availability	This action takes you to the Line Availability Screen screen where you can view the availability of the order line.
View Future Availability	This action takes you to the View Availability Notes Screen screen.
Fields	
Order #	The unique identifier of the order. Click this link to view the Order Detail Screen screen.
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 Selling and Fulfillment Foundation: Global Inventory Visibility User Guide*.
Description	The description of the item.
Receiving Node	The destination node of the order line.
Document Type	The document type associated with the order line.
Line #	The line number of the order line.
Unit of Measure	The units of measure in which the order line is calculated.
Ship Node	The node from which the order line is carried out.
Line Quantity	The quantity used to measure the ordered item.
Product Class	The item's product class.
Status	The status of the order line. Click this link to view the Order Line Status Breakup Screen screen.
Requested Delivery Date	The date on which the Buyer wants the order to be delivered.
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 114. Order Line Detail Screen, Charges and Taxes

Fields	**Description**
All the fields are tabulated against the overall, open and invoiced prices.	

Table 114. Order Line Detail Screen, Charges and Taxes (continued)

Fields	Description
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 Order Line Charges Screen, Remaining Order Line Charges Screen and Modifying an Order Line Charge.
Charges	The total charges applied the associated line. Click the hyperlink to view the Overall Order Line Charges Screen, Remaining Order Line Charges Screen and Modifying an Order Line Charge.
Tax	The total taxes applied to the order line. Click the hyperlink to view the Overall Order Line Taxes Screen, Remaining Order Line Taxes Screen and Invoiced Order Line Taxes Screen.
Totals	The total amount of the associated line after any charges and taxes have been applied.

The Ship To and Forward To panels display the shipping and the forwarding address. For modifying the addresses refer to the ShipTo and the ForwardTo table descriptions.

Table 115. Order Line Detail Screen, Additional Attributes

Fields	Description
Unit Price	The price of the line item listed by the Seller.
List Price	The price the item is listed at by the manufacturer.
Invoiced Quantity	The quantity of the line item that has been invoiced.
Retail Price	The selling price at which the item is listed.
Pre-settled Quantity	The quantity of the line item that has been pre-settled. Pre-settlement occurs when any quantity is collected prior to an order reaching a point in its lifecycle when collections are actually configured to be made.
Pre-settled Amount	The amount for which the line has been pre-settled. Pre-settlement occurs when any amount is collected prior to an order reaching a point in its lifecycle when collections are actually configured to be made. For example, an order is made for a $100 item. The customer plans to pay with a $20 gift card and a credit card. Your organization collects for amounts on an order at the time of shipment. In this example, the $20 gift card is accepted as a pre-settled amount and the additional $80 is collected from the credit card at the time of shipment. Therefore, anytime in the order's lifecycle before shipment occurs, this field displays $20 as the pre-settled amount.
Requested Ship Date	The date by which that the order line must be shipped.

Table 115. Order Line Detail Screen, Additional Attributes (continued)

Fields	Description
Requested Cancel Date	The date the order line should be cancelled by if it is not fulfilled.
Line Type	This field can be customized as needed.
Minimum Fill Quantity	The quantity of the order line item that must be scheduled from a single node for the line to begin shipping. For example, if there are 4 items in the order line and the Minimum Fill Quantity has been set to 3, the order line can begin shipping once 3 items have been scheduled to the order.
Distribution Rule	The distribution rule used for ship node determination. For more information about distribution rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.
Reservation ID	If the line is being reserved, an ID for the reservation is displayed.
Packlist Type	The packlist type.
Department Code	This field can be customized as needed.
Inventory UOM	The unit of measure for which inventory of the item is stored.
Customer PO #	The purchase order number given to the Buyer for the order.
Customer PO Line #	The purchase order line number given to the Buyer for the order.
Pricing UOM	The unit of measure used to calculate the price of the order.
Shipped Quantity	The quantity of this order line that has been shipped.
Received Quantity	The quantity of the order line that has been received.
Procure From Node Lookup	If this is a procurement transfer order, this field indicates the node from which the procurement order lines are fulfilled. For more information about procurement transfer orders, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.
Fulfillment Type	The fulfillment type is used to determine if there are any custom requirements used to determine sourcing locations associated with this order. For example, you are creating an order for a special promotion. According to your business practices, items involved with this promotion are to be sourced from a particular node called Node 1. To handle this scenario, a fulfillment type called 'Promotion' has been defined and a sourcing rule has been configured to source all orders with a fulfillment type of Promotion from Node 1. For more information about fulfillment types and sourcing rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.
Gift	Check this if the order line is a gift.
Intentional Backorder	If this field is set to `Y`, it means that the order was intentionally placed into backordered status at order creation.

Table 116. Order Line Detail Screen, Delivery Attributes

Field	Description
Delivery 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.
Associated Delivery Line Number	The line number and link to the associated delivery service order line, if applicable.
Shipping Paid By	The organization that pays for shipping the order line.
Carrier/Service	The carrier (such as UPS) and service (such as Ground or Next Day Air) for the order line.
Freight Terms	The freight terms used by the carrier.

Order Releases for Order Line Screen

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

Table 117. Order Line

Fields	Description
Order #	The unique identifier of the order. Click this link to view the Order Detail Screen screen.
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 Selling and Fulfillment Foundation: Global Inventory Visibility User Guide*.
Description	The description of the item.
Receiving Node	The destination node of the order line.
Line #	The line number of the order line.
Unit of Measure	The units of measure in which the order line is calculated.
Ship Node	The node from which the order line is carried out.
Line Quantity	The quantity used to measure the ordered item.
Product Class	The item's product class.
Status	The status of the order line. Click this link to view the Order Line Status Breakup Screen screen.
Requested Delivery Date	The date on which the Buyer wants the order to be delivered.
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 118. Order Releases for Order Line Screen, Order Releases

Action	Description
View Details	This action takes you to the Order Release Details Screen screen for the selected order lines.
Fields	
Release #	The line release number. Click this link to view the Order Release Details Screen screen.
Ship Node	The node that is shipping the order release. Click this link to view the Ship Node Detail screen.
Requested Ship Date	The date on which the Buyer wants the order release to be shipped.
Status	The current status of the order release. Click this link to view the Order Release Status Breakup Screen screen.

Order Line Instructions Screen

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

The order line panel field level descriptions can be referred from Order Line table descriptions.

Table 119. Instructions Window

Action	Description
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 **Instructions URL** icon.

You can also use the Instructions window for:

- Adding an Instruction - Select the **Add** 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 **Instructions** icon appears in the corresponding order line in the Order Detail Screen screen.

Bundle Components Screen

If the order line item is a bundle, you can view the component items that make up the bundle.

See Table 117 on page 99for field values descriptions for the order line panel. Table 120 provides field value descriptions for the bundle components.

Table 120. Bundles

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

Kit Components Screen

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

The order line panel field level descriptions can be referred from Order Line table descriptions.

Table 121. Kit Components

Fields	Description
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 Selling and Fulfillment Foundation: 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 order line.

More Order Line Addresses Screen

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 Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

The order line panel field level descriptions can be referred from Order Line table descriptions.

Viewing an Order Line's Chained Order Lines

About this task

The order line panel field level descriptions can be referred from Order Line table descriptions.

You can create chained orders for order lines and service lines such as provided service and delivery service. The service lines can be a stand alone or associated with a product item.

Note: A chained order cannot be created if the service line is included in a work order.

To view an order line's chained order lines:

Procedure

1. From the navigation bar, select Order.
2. Choose the Order Console. The Order Search window appears.
3. Search for the applicable orders.
4. From the list, select the check boxes of the applicable orders.
5. From the action bar, choose View Details. The Order Detail window appears.
6. From the Order Lines table, select the check boxes of the applicable lines.
7. From the Order Lines action bar, choose View Details. The Order Line Detail window appears.
8. From the Order action bar, choose the **Chained Orders** icon. The Related Orders window displaying any lines the specific line is chained to or derived from.

Results

If you have a return order line associated with the selected order line the following table is displayed.

Related Order Lines Screen

The Related Order Lines screen allows you to create chained orders for order lines and service lines.

Table 122. Related Order Lines Screen, Return Order Lines

Action	Description
View Details	This action takes you to the Return Line Detail screen for the selected return order lines. For more information about the Return Line Detail screen, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics User Guide*.
Fields	
Return #	The return order number. Click this link to view the Return Detail Screen. For more information about this screen, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics User Guide*.

Table 122. Related Order Lines Screen, Return Order Lines (continued)

Line #	The return line number. Click this link to view the Return Line Detail Screen. For more information about this screen, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics User Guide*.
Date	The date the return was created.
Relationship	The relationship of this return line with the sales order line.
Reason Code	The reason for the return of the item.
Quantity	The quantity returned.
Amount	The total amount of the return line.
Status	The status of the return line. Click this link to view the Return Line Status Breakup Screen. For more information about this screen, see the *Sterling Selling and Fulfillment Foundation: Reverse Logistics User Guide*.

Item Attributes Screen

You can add item classifications and additional item attributes in this screen.

The order line panel field level descriptions can be referred from Order Line table descriptions.

Table 123. Item Attributes Screen, Item Attributes

Fields	Description
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 124. Item Attributes Screen, Classifications

Fields	Description
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.

Table 124. Item Attributes Screen, Classifications (continued)

Fields	Description
UPC Code	The UPC code.

Table 125. Item Attributes Screen, Other Attributes

Fields	Description
Country/Region of Origin	The country or region 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`.

Order Line Dates Screen

You can enter new custom dates for the order line in this screen.

The order line panel field level descriptions can be referred from Order Line table descriptions.

Table 126. Order Line Dates Screen, New Dates

Field	Description
Date Type	The custom date type.
Requested	The date this date type has been requested to be met.
Expected	The date this date type is expected to be met.
Actual	The date this date type is to be met.

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Inventory Information Screen

You can view an order line's segment information in this screen. Also, if the order line item is tag-controlled, you can view and modify the line item's tag attributes.

For the order line panel field value descriptions, refer to Order Line table descriptions.

Table 127. Inventory Information Screen, Inventory Information

Fields	Description
Segment Type	The segment type with which the order line is associated.
Segment	The identifier of the segment with which the order line is associated.

Table 127. Inventory Information Screen, Inventory Information (continued)

Fields	Description	
Serial #	The order line item's serial number. **Note:** This field appears only if the item is defined as having serial numbers tracked in inventory. For more information about serial-tracked items, see the *Catalog Management: Configuration Guide*.	
Tag Identifiers	Displays the unique tag identifiers you have specified for the item (for example, Lot #). **Note:** This field only appears if the item is defined as being always or sometimes tag controlled. For more information about tag-controlled items, see the *Sterling Selling and Fulfillment Foundation: Catalog Management Concepts Guide*.	
	Lot #	Enter the Lot number associated with this tag identifier.
	Batch #	Enter the Batch number associated with this tag identifier.
	Revision #	Enter the Revision number associated with this tag identifier.
Tag Attributes	Displays any descriptive identifiers you have specified (for example, Manufacture Date). **Note:** This field only appears if the item is defined as being always or sometimes tag-controlled. For more information about tag-controlled items, see the *Sterling Selling and Fulfillment Foundation: Catalog Management Concepts Guide*.	
	Lot Key Reference	Enter the Lot key reference associated with this tag attribute.
	Manufacturing Date	Enter the manufacturing date for this tag attribute.
	Lot Attribute 1	Enter the lot attribute 1 with this tag attribute.

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Associated Service Requests Screen

You can view the service items associated with a product item.

Table 128. Associated Service Requests Screen, Order Line

View Icon	Description
Add Provided Service	**Add Service Requests** - This icon takes you to the Add Service Requests Screen screen to add the required service requests associated with the product line.
Fields	
Order #	The unique identifier of the order. Click this link to view the Order Detail Screen screen.
Item ID	The product item's ID.
Description	The description of the item.
Receiving Node	The destination node.
Line #	The line number of the service.

Table 128. Associated Service Requests Screen, Order Line (continued)

Unit of Measure	The units of measure in which the service is calculated.
Ship Node	The node from which the service is carried out.
Line Quantity	The quantity used to measure the service.
Product Class	The item's product class.
Status	The status of the service request. Click this link to view the Service Request Status Breakup Screen screen.
Requested Delivery Date	The date on which the Buyer wants the order to be delivered.

Table 129. Associated Service Requests Screen, Service Request

Action	**Description**
Cancel	This action lets you cancel the selected service requests. Upon clicking this button a Modification Reason Screen screen pops up to enter the cancellation reason.
Fields	
Line Number	The service's line number.
Item ID	The service's ID.
Item Description	The description of the service.
Appointment	The date and time of the service.
Service Offset (Hrs)	The number of hours which the service is offset to.
Amount	Amount of the service.
Status	The current status for the service.

Add Service Requests Screen

Items that require specialized post-delivery handling (for example, installation) can be associated with a provided service through the Applications Manager. When you create a service request for an order, a return, you are associating services (intangible items) with products (tangible items).

Note: Product items with associated service items are indicated by:

Add Provided Service icon - Provided services can be added to this product line. After you add the first provided service, the icon changes to a **Provided Item** icon.

Provided Item icon- Additional provided services can be added to this product line.

Table 130. Add Service Requests Screen, Order Line

View Icon	**Description**
Provided Item	**View Associated Service** - This icon takes you to the Associated Service Requests Screen screen to view the service requests associated with the product line.
Fields	
Order #	The unique identifier of the order. Click this link to view the Order Detail Screen.
Item ID	The product item's ID.

Table 130. Add Service Requests Screen, Order Line (continued)

Description	The description of the item.
Receiving Node	The destination node.
Line #	The line number of the service.
Unit of Measure	The units of measure in which the service is calculated.
Ship Node	The node from which the service is carried out.
Line Quantity	The quantity used to measure the service.
Product Class	The item's product class.
Status	The status of the service request.
Requested Delivery Date	The date on which the Buyer wants the order to be delivered.

Table 131. Add Service Requests Screen, Service Request

Field	**Description**
Options	The Options table displays only when a provided service has any optional services available, such as clean up or old applicancy removal.
Item ID	The service item's ID.
UOM	The unit of measure for the service.
Item Description	Displays the description of the service.
Price	The cost of the service item.

When you add a service, a Service Requests table is added to the Order Detail screen.

Order Line Audits Screen

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

The order line panel field level descriptions can be referred from Order Line table descriptions.

Table 132. Order Line Audits Screen, Order Line Audits

Action	**Description**
View Details	This action takes you to the Order Audit Details Screen screen for the selected order lines.
Fields	
Order Created in Sterling Selling and Fulfillment Foundation	The date and time the order was created in our system.
Audit #	The audit identification number. Click the audit identification number to view the Order Audit Details Screen 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.

Table 132. Order Line Audits Screen, Order Line Audits (continued)

Modification type	The type of modification performed.

Line Availability Screen

This screen provides the availability of the product line. It also provides an expected delivery date along with any constraints that are present in the order.

The order panel field level descriptions can be referred from Order table.

The following table enables you to fine-tune your shipping preferences. Enter the appropriate search criteria in the following fields and choose the Search button.

Table 133. Line Availability Screen, Order Lines Being Shipped

Action	**Description**
Schedule	This action schedules the order line shown in the shipment panel. **Note:** This action ignores any holds that are meant to prevent schedule from occurring.
Fields	
Optimize On	• Date - Finds the best options for shipping the product as early as possible. • Number of Shipments - Finds the best options for minimizing the number of shipments.
Delay Window	Enter any delay against the delivery date that can be accepted for adequate sourcing, if applicable.
Distribution Rule	Select the distribution rule you want to use for locating the ship nodes the line item ID can be sourced from, if applicable.
SCAC And Service	Select the carrier service you want to use, if applicable.

The Order Lines Being Delivered panel displays the shipment information for each set of items that share the same ship node address and the same delivery address. The following shipment and delivery information is displayed in the Order Lines Being Delivered or Order Lines Being Shipped panels.

The shipment and delivery title bar displays the shipment and delivery number within the set and the date the delivery is expected to be shipped. The icons placed in the calendar is also explained in the following table:

Table 134. Line Availability Screen, Shipment or Delivery

View Icons	**Description**
Reservations	This icon signifies the product availability date.
Shipping Cartons	This icon signifies the expected ship date
Shipments	This icon signifies the expected delivery date.
Warning Indicator	This icon signifies that the line is awaiting procurement acceptance from a node.
Line Has Constraints	This icon specifies that the line has some associated constraints.

Table 134. Line Availability Screen, Shipment or Delivery (continued)

Nonworking Day	This icon specifies the line's nonworking days.
Fields	
Line	The order line number. Click this link to view the associated Order Line Detail Screen screen.
Item ID	The item ID of the product or delivery item.
Quantity	The line quantity of the ordered item.
Calendar	The calendar shows the days the item is available for shipping or delivery.

The Unscheduleable order lines are represented in the following table if they cannot be scheduled for any reason.

Table 135. Line Availability Screen. Unscheduleable Order Lines

Fields	Description
Line	The order line number.
Item ID	The item ID of the product or delivery item.
PC	The item's product class.
UOM	The item's unit of measure.
Quantity To Schedule	The line quantity of the ordered item.
Reason	The condition that prevents the item from being schedulable.

Create Dependency Screen

You can create a shipping dependency between two or more order lines. A line dependency indicates whether order lines are shipped together or delivered together.

Note: You can only create one level of dependency through the user interface.

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

Table 136. Create Dependency Screen, Dependent Order Lines

Fields	Description
Parent	Select the order line to be identified as the parent line. All other lines in the dependency are dependent on this line. No shipment or delivery (depending on the dependency type) can be made for any of the dependent lines until the parent line is fulfilled according to its minimum fill quantity.
Line	The order line number.
Item ID	The item ID.
PC	The product class.
UOM	The order line item's unit of measure.
Description	A description of the order line item.
Recv Node	The node the order line is received at.
Ship Node	The node the order line is shipped from.
Ship Date	The date the order line is shipped.

Table 136. Create Dependency Screen, Dependent Order Lines (continued)

Fields	Description
Line Qty	The quantity of the line item. **Note:** Entering 0 indicates a quantity of zero. Leaving this field blank indicates you want to ignore the line.
Amount	The cost of the order line.
Status	The order line status.

The dependency properties are specified in the following table:

Table 137. Create Dependency Screen, Dependency Properties

Fields	Description
Ship Together	Select ship together if you want all of the dependent order lines to be shipped at the same time as the parent order line.
Deliver Together	Select Deliver Together if you want all of the dependent order lines to be delivered at the same time as the parent order line.
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.

Once the details are entered select the `Create Dependency` button and you are returned to the Order Detail screen. The parent and child order line now have a dependency icon before the Line #.

View Dependency Screen

If an order line has dependency on another line, you can view the dependency details. Select the child or parent dependency icons (**Dependent Parent** icon, **Dependent Child** icon) shown in the order lines panel of the Order Detail Screen screen to view the dependency details.

The parent order line panel field level definitions can be referred from Order Line table descriptions.

Table 138. View Dependency Screen, Dependent Order Lines

Action	Description
Break Dependency	This action breaks the dependency of the selected child order lines with the parent order line.
Fields	
Line	The order line number.
Item ID	The item ID.
PC	The product class.
UOM	The order line item's unit of measure.
Description	A description of the order line item.
Recv Node	The node the order line is received at.
Ship Node	The node the order line is shipped from.

Table 138. View Dependency Screen, Dependent Order Lines (continued)

Ship Date	The date the order line is shipped.
Line Qty	The quantity of the line item. **Note:** Entering 0 indicates a quantity of zero. Leaving this field blank indicates you want to ignore the line.
Amount	The cost of the order line.
Status	The order line status.
Dependency Properties	The dependency properties that were defined while creating the dependency can be modified in this screen. Refer to the "Create Dependency Screen, Dependency Properties" table.

Item Substitution Screen

You can substitute items for an existing order line item. For example, if the customer has an item on backorder and they would rather get another similar item instead of waiting, you may substitute the existing order line item with the new item.

An item must be associated with other items as configured in Catalog Management in the Applications Manager to perform a substitution. For more information about configuring item substitutions, see the *Sterling Selling and Fulfillment Foundation: Catalog Management Concepts Guide*.

The order line panel field level definitions can be referred from Order Line table descriptions.

Table 139. Item Substitution Screen, Substitution

Fields	Description
Status	If you want to substitute only the quantity of a line that is in a certain status, choose the appropriate status here and choose the GO button.
Quantity	The line quantity of the ordered item.
Quantity To Substitute	Enter the quantity of items you want to substitute and choose the GO button.
Item ID	The substitution item's item ID.
PC	The substitution item's product class.
UOM	The substitution item's unit of measure.
Description	A description of the substitution item.
Priority	The substitute item's priority.
Associated Qty	The quantity that has been configured for the associated item in the Applications Manager.
Substitution Qty	The quantity of the new order line if you choose to substitute with this item.

Add Kit Line Screen

You can add logical kits in this screen. Select `Add Logical Kit` in the order line panel of the Order Detail Screen screen.

Table 140. Add Kit Line Screen, Order Line

Fields	Description
Order #	The order number. Click this link to view the Order Detail Screen screen.
Item ID	Enter the item ID for adding a logical kit.
Unit of Measure	Select the unit of measure.
Product Class	Select the product class.
Line Quantity	Enter the line quantity.
Description	Enter the description of the item
Receiving Node	Enter the node that is receiving the product.
Ship Node	Enter the node that is shipping the product.
Requested Delivery Date	Enter the requested delivery date.

Table 141. Add Kit Line Screen, Kit Components

Fields	Description
Item ID	Enter the items that make up the kit.
PC	Select the kit component's product class.
UOM	Select the kit component's unit of measure.
Description	Enter a brief description of the kit component.
Quantity	Enter the quantity of the kit component in the kit.

Overall Order Line Charges Screen

You can view the header level charges of an order line in this screen.

Note: This window displays all order charges and discount charges against the order header.

The order line header field descriptions can be referred from the Order Line table.

Table 142. Overall Order Line Charges Screen, Charges

Fields	Description
Ordered Quantity	The quantity of the line item that has been ordered.
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.
Charge Amount	The amount of the charge that is applied to the header level.

Overall Order Line Taxes Screen

You can view the header level tax information associated with an order.

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

Table 143. Overall Order Line Taxes Screen, Taxes

Fields	Description
Ordered Quantity	The quantity of the line item that has been ordered.
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:** 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:** An order header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An order header level tax cannot be applied to a price value.
Charge Name	The charge name with which the tax is associated. **Important:** An order header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An order 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.

Remaining Order Line Charges Screen

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

Note: This panel displays all order charges and discount charges against the order line.

The order line panel field level definitions can be referred from Order Line table descriptions.

Table 144. Remaining Order Line Charges Screen, Charges

Field	Description
Open Quantity	The quantity of the line item that has been ordered.
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 144. Remaining Order Line Charges Screen, Charges (continued)

Field	Description
Charge Category	The category of the charge. Select the appropriate charge category for calculating the remaining order line charges.
Charge Name	The name of the charge.
Per Unit	Enter the amount of the charge applied to an individual line item.
Per Line	Enter the amount of the charge applied to the entire order line.
Charge Amount	The amount of the charge that is applied to the order line level. This is calculated from the unit price and line price.

You can also use the Remaining Order Line Charges Detail window for:

- **Adding Remaining Order Charges** - From the Charges table, choose the **Add** icon. 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 order charges and discount charges. Consult your system administrator to determine which charges should be used as order charges and which should be used as discount charges.

  Click `Save` after making changes to the charges panel to update the remaining order charges. The Modification Reason Screen screen appears, enter the appropriate reason code and text and click `OK`.
- **Modifying Remaining Order 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 screen appears, enter the appropriate reason code and text and click `OK`.

Remaining Order Line Taxes Screen

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

The order line panel field level definitions can be referred from Order Line table descriptions.

Table 145. Remaining Order Line Taxes Screen, Taxes

Field	Description
Remaining Quantity	The quantity of the line item that has been ordered.
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:** 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 category the tax is associate with, if applicable.
Charge Name	The 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.

Table 145. Remaining Order Line Taxes Screen, Taxes (continued)

Field	Description
Tax Percentage	The percentage of tax that is applied to the order line price.
Tax Amount	The amount of the tax that is applied to the order line level.

- **Adding Remaining Order Taxes** - From the Taxes panel, choose the **Add** icon. 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 discount taxes. Consult your system administrator to determine which charges should be used as order taxes and which should be used as discount taxes.

  Click `Save` after making changes to the taxes panel to update the remaining order taxes. The Modification Reason Screen screen appears, enter the appropriate reason code and text and click `OK`.
- **Modifying Remaining Order 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 screen appears, enter the appropriate reason code and text and click `OK`.

Modifying an Order Line Charge

About this task

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

If you want to modify a order line charge after the invoice is created, you need to complete the following steps:

Procedure

1. Check to see if the "Apply Price Change To Invoiced Quantity" is selected in the sales order financial attributes in the Applications Manager.
2. In the Order Line details, enter the total amount of the charge and not just the difference.

Results

The above steps are necessary if you want to make modifications after an invoice has been created for the charges and taxes from the "Order Detail Screen" and the "Order Line Detail Screen" screens.

The order line header field descriptions can be referred from the Order Line table.

Invoiced Order Line Charges Screen

The Invoiced Order Line Charges screen lets you view the invoice-level charges of an order line.

Table 146. Invoiced Order Charges Screen, Charges

Fields	Description
Invoiced Quantity	The quantity of the line item that has been invoiced.

Table 146. Invoiced Order Charges Screen, Charges (continued)

Fields	Description
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.
Charge Amount	The amount of the charge that is applied to the header level.

Invoiced Order Line Taxes Screen

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

The order line header field descriptions can be referred from the Order Line table.

Table 147. Invoiced Order Taxes Screen, Taxes

Fields	Description
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.
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:** An order header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An order header level tax cannot be applied to a price value.
Charge Name	The charge name with which the tax is associated. **Important:** An order header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An order 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.

Order Line Status Breakup Screen

You can view the order line's breakup by status.

The order line panel field level descriptions can be referred from Order Line table descriptions.

Table 148. Order Line Status Breakup

Field	Description
Order Line	
Order #	The order with which the order line is associated.
Line #	The order line number.
Line Quantity	The quantity of the order line item ordered.
Item ID	The item ID.
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 order line.
Receiving Node	The node that receives the shipped order line.
Ship Node	The node that is shipping the order.
Procure From Node	The node that the item is being procured from.
Requested Delivery Date	The date on which the Buyer wants the order line to be delivered.
Status Breakup	
Release #	The line release number.
Ship Node	The node that is shipping the order line.
Receiving Node	The node that is receiving the order line.
Last Changed On	The date the status was last changed.
Status	The current status of the order line.
ETS	The estimated date the order line is to be shipped.
Quantity	The quantity of the order line item ordered.
Tag #	If the item is tag controlled and tag details were requested for the order, the tag number associated with the order line is displayed.
ETD	The estimated time the order line is to be delivered.

Order Release Search By Status Screen

You can search for order releases based on the status in this screen.

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 149. Order Release Search By Status

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.

Table 149. Order Release Search By Status (continued)

Fields	Description
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	The order number of the order line you are searching for, if applicable.
Release Number	The order release number of the order release you are searching for if applicable.
Buyer	The Buyer of the order releases you want to search for, if applicable.
Seller	The Seller of the order releases you want to search for, if applicable.
Ship Node	The ship node associated with the order releases you want to search for, if applicable.
Receiving Node	The receiving node associated with the order releases you want to search for, if applicable.
Product Releases / Service Releases	Choose whether to search for releases containing the product items or service items.
Delivery Method	Choose the delivery method used to get the product items to the recipient, if applicable.
Order Release Line Status	The status range of the order releases you want to search for, if applicable.
Max Records	The maximum number of order releases you want returned from your search.

Click on `Search` after entering the relevant information and the Order Release List Screen screen is displayed.

Order Release Search By Item Screen

You can search for order releases based on the item information in this screen.

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 150. Order Release Search By Item

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.

Table 150. Order Release Search By Item (continued)

Fields	Description
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	Enter the order number of the order line you are searching for, if applicable.
Release Number	Enter the order release number of the order release you are searching for if applicable.
Buyer	Enter the Buyer of the order releases you want to search for, if applicable.
Seller	Enter the Seller of the order releases you want to search for, if applicable.
Ship Node	Enter the ship node associated with the order releases you want to search for, if applicable.
Receiving Node	Enter the receiving node associated with the order releases you want to search for, if applicable.
Product Releases / Service Releases	Choose whether to search for releases containing the product items or service items.
Delivery Method	Choose the delivery method used to get the product item to the recipient, if applicable.
Customer PO	The customer's purchase order number.
Item ID	Enter the item ID to search for order releases containing a specific item, if applicable.
Product Class	Select an item product class to search for order releases containing an item that has a specific product class, if applicable.
UOM	Select an item unit of measure to search for order releases containing an item that has a specific unit of measure, if applicable.
Item Description	Enter the item description you want the order releases you are searching for to be associated with, if applicable.
Customer Item ID	Enter the customer's item ID to search for order releases containing an item that has a specific customer item ID, if applicable.
Customer PO Number	Enter the customer's purchase to search for order releases containing an item that has a specific customer purchase order number, if applicable.
Max Records	Enter the maximum number of order releases you want returned from your search.

Click on `Search` after entering the relevant information and the Order Release List Screen screen is displayed.

Order Release Search By Date Screen

You can search for order releases based on the release dates in this screen.

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 151. Order Release Search By Date

Fields	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	Enter the order number of the order line you are searching for, if applicable.
Release Number	Enter the order release number of the order release you are searching for if applicable.
Buyer	Enter the Buyer of the order releases you want to search for, if applicable.
Seller	Enter the Seller of the order releases you want to search for, if applicable.
Ship Node	Enter the ship node associated with the order releases you want to search for, if applicable.
Receiving Node	Enter the receiving node associated with the order releases you want to search for, if applicable.
Product Releases / Service Releases	Choose whether to search for releases containing the product items or service items.
Delivery Method	Choose the delivery method used to get the product item to the recipient, if applicable.
Order Date	Enter the order date range through which you want to search for order releases, if applicable.
Requested Ship Date	Enter the requested ship date range through which you want to search for order releases, if applicable.
Requested Delivery Date	Enter the requested delivery date range through which you want to search for order releases, if applicable.
Max Records	Enter the maximum number of order releases you want returned from your search.

Click on `Search` after entering the relevant information and the Order Release List Screen screen is displayed.

Order Release Search By Logistics Screen

You can search for order releases based on the logistics in this screen.

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 152. Order Release Search By Logistics

Fields	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	Enter the order number of the order line you are searching for, if applicable.
Release Number	Enter the order release number of the order release you are searching for if applicable.
Buyer	Enter the Buyer of the order releases you want to search for, if applicable.
Seller	Enter the Seller of the order releases you want to search for, if applicable.
Ship Node	Enter the ship node associated with the order releases you want to search for, if applicable.
Receiving Node	Enter the receiving node associated with the order releases you want to search for, if applicable.
Product Releases / Service Releases	Choose whether to search for releases containing the product items or service items.
Delivery Method	Choose the delivery method used to get the product item to the recipient, if applicable.
Carrier	Enter the carrier associated with the order releases you want to search for, if applicable.
Shipping Paid By	Select the organization that paid for the shipping of the order releases you want to search for, if applicable.
Carrier Account Number	Enter the carrier account number you want the order releases to be associated with, if applicable.
Max Records	Enter the maximum number of order releases you want returned from your search.

Click on `Search` after entering the relevant information and the Order Release List Screen screen is displayed.

Order Release List Screen

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

Table 153. Order Release List

Actions	Description
View Details	This action takes you to the Order Release Details Screen screen for the selected order releases. You can view the details of the release, back order items or create shipments in this screen.
View Shipments	This action takes you to the Order Release Shipments Screen screen where you can view the shipments for the order releases.
View More Addresses	This action takes you to the More Order Release Addresses Screen screen where you can add or modify the addresses for releases.
View Notes	This action takes you to the Notes Screen screen to add or modify the notes for the selected releases.
Create Shipment	This action lets you create the shipments for selected order releases.
Fields	
Order #	The sales order number of the selected release.
Release #	The release number. Click this link to view the Order Release Details Screen screen.
Ship Node	The source node the product is shipped from.
Ship To	The destination node the product is shipped to.
Expected Delivery Date	The expected delivery date of the order release.
Status	The status of the order release.

Order Release Details Screen

The order release details screen lets you create shipments, view shipments, backorder items and view associated addresses and dates.

Table 154. Order Release Details Screen, Order Release

View Icons	Description
Shipments	**Shipments** - This icon takes you to the Order Release Shipments Screen screen where you can view the shipment details of the order release.
Address	**More Addresses** - This icon takes you to the More Order Release Addresses Screen screen where you can add or modify order releases addresses.
Notes	**Notes** - This icon lets you view the Notes Screen screen where you can add the notes for an order release. If notes have been added, the **Notes Check** icon is displayed instead.
Shipment Data Types	**Order Release Dates** - This icon takes you to the Order Dates Screen screen to view the requested, expected and actual date type for the given order.
Actions	
Back Order	This action lets you backorder the selected order releases.

Table 154. Order Release Details Screen, Order Release (continued)

Create Shipment	This action lets you create shipments for the order releases. Upon clicking this action you are taken to the Shipment Details screen where you can enter the shipment details and click `Save` to create the shipment.
Fields	
Enterprise	The Enterprise associated with the order release.
Buyer	The Buyer organization that placed the order.
Seller	The Seller organization that is handling the order.
Order #	The order that the release belongs to.
Status	The current status of the release.
Created On	The date the release was created.
Order Type	This field can be customized as needed.
Release #	The release number.
Ship Advice #	The ship advice number.
Document Type	The order document type. For example, Sales Order.

Table 155. Order Release Details Screen, Additional Attributes

Fields	**Description**
Ship Node	The node the order return has been released to.
Receiving Node	The node that receives the shipped order (if release is being shipped).
Packlist Type	The packlist type (if release is being shipped).
Requested Delivery Date	The date on which the Buyer wants the order release to be delivered (if release is being shipped).
Requested Ship Date	The date on which the Buyer wants the order release to be shipped (if release is being shipped).
Ship Together	Indicates whether an order line dependency has been created for the release lines to be shipped together (if release is being shipped). For more information about order line dependencies, see Create Dependency Screen screen.
Ship Line Complete	Indicates whether or not the entire line must be shipped together or as items become available (if release is being shipped).
Merge Node	If order lines are coming from multiple nodes and are being consolidated them into one load, this field displays the node at which all of the dependent order lines are consolidated with the parent order line (if release is being shipped).
Carrier/Service	The carrier and carrier service used for shipping the order (if release is being shipped).
Carrier Account #	The Carrier organization's account number with your organization (if release is being shipped).
Shipping Paid By	The organization that pays for shipping the order line (if release is being shipped).
Freight Terms	The freight terms used by the carrier (if release is being shipped).
Gift	Indicates if this release line is a gift.

The Ship To panel can be used to edit the shipping addresses. For more information about the Ship To panel, see Table 13 on page 34.

Table 156. Order Release Details Screen, Order Release Lines

Action	Description
View Details	This action takes you to the Order Line Detail Screen screen.
Fields	
Line	The order release line number. Click this link to view the Order Line Detail Screen 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.
Description	A description of the item.
Line Qty	The amount of line items that have not yet been scheduled and released. **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 order line. Click this link to view the Order Release Line Status Breakup Screen screen.

Order Release Shipments Screen

As soon as any part of a release has shipped, you can view the details of that shipment.

Table 157. Order Release

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

Table 158. Order Release Shipments Screen, Shipments

Action	Description
View Details	This action takes you to the Shipment Details screen where you can view the details of the selected shipments.
Fields	
Shipment #	The shipment number. Click this link to view the Shipment Details screen.

Table 158. Order Release Shipments Screen, Shipments (continued)

Shipper's Ref. #	The shipper's reference number.
Expected Ship Date	The expected ship date for the order release.
Ship Mode	The mode of shipping.
Ship node	The node to which the shipment is being shipped.
Recv Node	The node receiving the shipment.
Status	The status of the shipment.

More Order Release Addresses Screen

About this task

You can view any additional addresses that pertain to a release as per your business practices. For more information about defining additional address types, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

The order release header panel can be referred from the Order Release table.

In this screen locate the address you want to modify and choose the **Address Details** icon. The Modify Address window appears. Modify the applicable information and click `OK`.

Notes Screen

You can view notes detailing any additional information about a release.

The order release header panel can be referred from the Order Release table.

Table 159. Notes Screen, Notes

Fields	Description
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.

Order Release Dates Screen

You can view any custom dates that have been configured for monitoring. For more information about monitoring, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

The order release header panel can be referred from the Order Release table.

Table 160. Order Release Dates

Fields	Description
Date Type	The custom date type.
Requested	The date this date type has been requested to be met.
Expected	The date this date type is expected to be met.
Actual	The date this date type is to be met.

Backordering an Order Release

You can backorder an order release when there is not enough inventory at your node to fulfill it. The release remains backordered until inventory becomes available.

Order Release Status Breakup Screen

You can view a release's breakup by status.

The order release header panel can be referred from the Order Release table.

Table 161. Order Release Status Breakup Screen, Order Release by Status

Fields	Description
Line #	The order release line number. Click this link to view the Order Line Detail Screen screen.
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.
Ship Node	The node that is shipping the order line.
Last Changed On	The date the line last had a status change.
Status	The current status for that part of the order line.
Quantity	The quantity of the line item ordered.
Tag #	The batch with which the order line is associated. **Note:** This field is only applicable if the item is lot controlled.
ETS	The estimated time of shipment. To modify, enter the quantity you want to change the estimated time of shipment of in Quantity and the new estimated time of shipment in ETS.

Order Release Line Status Breakup Screen

You can view a release's line breakup by status. For more information about the order release header panel, see Table 157 on page 124.

Table 162. Order Release Line Status Breakup Screen, Release Line Status Breakup

Fields	Description
Ship Node	The node that is shipping the order line.
Receiving Node	The node that is receiving the order line.
Last Changed On	The date the line last had a status change.
Status	The current status for that part of the order line.
ETD	The estimated time of delivery.
Quantity	The quantity of the line item ordered.
Tag #	The batch with which the order line is associated. **Note:** This field is only applicable if the item is lot controlled.
ETS	The estimated time of shipment. To modify, enter the quantity you want to change the estimated time of shipment of in Quantity and the new estimated time of shipment in ETS.

Service Request Search By Item Screen

The Provided Service Request Search window enables you to view a list of provided service request order lines that contain specialized labor requirements, based on the search criteria that you supply. In this screen you can search for service requests by item.

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 163. Service Request Search By All Attributes

Fields	Description
Organization	The organization associated to this order.
Item ID	Enter the item ID to search for.
Unit of Measure	Enter the unit of measure for the provided service item.
Short Description	Enter the short description to search for.
Max Records	Enter the maximum number of service requests you want returned from your search.

Click on `Search` after entering the relevant information and the Service Item List Window screen is displayed.

Service Request Search By Draft Orders Screen

The Provided Service Request Search window enables you to view a list of provided service request order lines that contain specialized labor requirements, based on the search criteria that you supply. In this screen you can search for service requests that were made for draft orders.

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 164. Service Request Search By Draft Orders

Fields	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	Enter the order number you are searching for, if applicable.
Buyer	Enter the Buyer of the service requests you want to search for, if applicable.
Seller	Enter the Seller of the service requests you want to search for, if applicable.
Buyer Account Number	Enter a Buyer account number to search for service requests of a draft order containing a particular Buyer account number, if applicable.
Max Records	Enter the maximum number of service requests you want returned from your search.

Click on `Search` after entering the relevant information and the Service Request List Window screen is displayed.

Service Item List Window

The Service Item List window displays the results of a provided service item 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 165. Service Item list

Actions	Description
Add to Order	Select an item from the list and click this action to add the item to an order. This takes you to the Service Request Details Screen screen.
Fields	
Item ID	The provided service item ID.
UOM	The unit of measure for the provided service item.
Short Description	The short description for the provided service item.

Service Request List Window

The Service Request List window displays the results of a provided service 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 166. Service Request List

Actions	**Description**
View Details	This action takes you to the Service Request Details Screen 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 screen where you can enter instructions for the selected service requests.
More Addresses	This action takes you to the More Service Request Addresses Screen screen where you can add, modify or view additional addresses for the selected service requests.
Remove	This action removes the selected **Draft** service requests only.
Cancel	This action can be used to remove the selected service requests.
Fields	
Order #	The sales order associated with the service request.
Line #	The line number of the service request in the sales order. Click this link to view the Service Request Details Screen screen.
Status	The status of the service request.
Enterprise	The enterprise owner of the order.
Order Date	The date on which the order is placed.
Total Amount	The total cost involved for this service request.

Service Request Details Screen

You can view the service request details in this screen.

Table 167. Service Request Details Screen, Service Request

View Icons	**Description**
Work Orders	**View Work Order** - This icon takes you to the Work Order Details screen where you can view the related work order associated with this service request.
Instructions	**Instructions** - This icon lets you view the Service Request Instructions Screen screen where you can add, modify the instructions for the service request.
Address	**More Addresses** - This icon takes you to the More Service Request Addresses Screen screen where you can add or modify address.
Shipment Data Types	**Service Request Dates** - This icon takes you to the Service Request Dates Screen screen to view the requested, expected and actual date type for the given request.

Table 167. Service Request Details Screen, Service Request (continued)

Chained Orders	**Related Orders** - This icon lets you view the Viewing an Order Line's Chained Order Lines screen. For example you can view the Return Orders created from the order console by clicking this icon.
Additional Attributes	**Additional Attributes** - This icon takes you to the Service Request Additional Attributes Screen screen where you can specify additional attributes for fulfillment.
Actions	
Cancel	Select this action to cancel the service request. It pops up a Modification Reason Screen screen where you should enter the reason and code before cancelling the service request.
Fields	
Order Number	The unique identifier of the order. Click this link to view the order details.
Item ID	The service item's ID.
Description	The description of the service.
Appointment	The date and time of the service.
Line Number	The line number of the service.
UOM	The units of measure in which the service is calculated.
Ship Node	The node from which this service is carried out.
Status	The status of the service request. Click this link to view the Service Request Status Breakup Screen screen.
Line Quantity	The quantity used to measure the service. If the request is not associated with a product line, you can edit the quantity by entering a new value and clicking Save.
Document Type	The document type associated with the service request.

Table 168. Charges and Taxes

Fields	**Descripton**
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 Service Request Charges Screen, Remaining Service Request Charges Screen and Invoiced Service Request Charges Screen.
Charges	The total charges applied the associated line. Click the hyperlink to view the Overall Service Request Charges Screen, Remaining Service Request Charges Screen and Invoiced Service Request Charges Screen.
Tax	The total taxes applied to the order line. Click the hyperlink to view the Overall Service Request Taxes Screen, Remaining Service Request Taxes Screen and Invoiced Service Request Taxes Screen.
Totals	The total amount of the associated line after any charges and taxes have been applied.

Table 169. Options

Fields	Description
The Options table displays only when a provided service has any optional services available, such as clean up or old appliance removal. If the request is not associated with a product line, you can add or remove options using the checkboxes, and clicking Save.	
Option ID	The option's ID
Description	The option's description.
Quantity	The quantity of the option.
Price	The option's price.

For more information about the shipping address screen, see Table 13 on page 34.

Table 170. Service Request Details Screen, Associated Order Lines

Action	Description
View Details	This action takes you to the Order Line Detail Screen screen where you can view the associated order line details.
Fields	
Line Number	The item's line number. Click this link to view the order details.
Item ID	The order line item's ID.
PC	The item classification such as first quality, second quality, or finished good. Orders are placed for a particular classification.
UOM	The order line item's unit of measure.
Description	The order line item's description.
Line Quantity	The quantity of the line item ordered.
Total Amount	The order line item's total amount.
Status	The current status for that part of the order line.

For a request that is not associated with a product line, this panel does not contain any lines.

Service Request Instructions Screen

You can add instruction to the service request in this screen.

Table 171. Service Request

Fields	Description
Order Number	The unique identifier of the order. Click this link to view the Order Detail Screen screen.
Item ID	The service item's ID.
Description	The description of the service.
Appointment	The date and time of the service.
Line Number	The line number of the service.
UOM	The units of measure in which the service is calculated.

Table 171. Service Request (continued)

Fields	Description
Ship Node	The node from which this service is carried out.
Status	The status of the service request. Click this link to view the Service Request Status Breakup Screen screen.
Line Quantity	The quantity used to measure the service.
Document Type	The document type associated with the service request.

Table 172. Instructions Window

Action	Description
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 **Instructions URL** icon.

You can also use the Instructions window for:

- Adding an Instruction - Select the **Add** 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 Order Instructions screen can be modified by entering the modified information and selecting `Save`.

Once the instructions are added, the **Instructions** icon appears in the corresponding service request line in the Order Detail Screen screen.

More Service Request Addresses Screen

About this task

You can view any additional addresses that pertain to a service request as per your business practices. For more information about defining additional address types, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

The service request header panel can be referred from the Service Request table.

In this screen locate the address you want to modify and choose the **Address Details** icon. The Modify Address window appears. Modify the applicable information and click `OK`.

Service Request Dates Screen

You can view any custom dates that have been configured for monitoring. For more information about monitoring, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

The service request header field descriptions can be referred from the Service Request table.

Table 173. Service Request Dates Screen, New Dates

Fields	Description
Date Type	The custom date type.
Requested	The date this date type has been requested to be met.
Expected	The date this date type is expected to be met.
Actual	The date this date type is to be met.

Service Request Additional Attributes Screen

You can set the fulfillment type for a service request. The fulfillment type is used to determine if there are any custom requirements used to determine sourcing locations associated with this order. For example, you are creating an order for a special free service promotion. According to your business practices, the service involved with this promotion is to be sourced from a particular node called Node 1. To handle this scenario, a fulfillment type called 'Promotion' has been defined and a sourcing rule has been configured to source all services with a fulfillment type of Promotion from Node 1. For more information about fulfillment types and sourcing rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

The service request header panel descriptions can be referred from Service Request table.

Table 174. Additional Attributes

Field	Description
Fulfillment Type	Select the fulfillment type associated with this service request.

Service Request Status Breakup Screen

The status breakup enables you to view the status of a service request.

The service request header panel descriptions can be referred from Service Request table.

Table 175. Service Request Status Breakup Screen, Status Breakup

Fields	Description
Release #	The order line release number, if the order has been released to a node.
Ship Node	The node that performs the service request.
Last Changed On	The date the line last had a status change.
Status	The current status for that part of the service request.
Quantity	The quantity of the service request.

Overall Service Request Charges Screen

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

The service request header panel descriptions can be referred from the Service Request table.

Table 176. Overall Service Request Charges Screen, Charges

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

Overall Service Request Taxes Screen

You can view the header level tax information associated with a service request.

The service request header panel descriptions can be referred from the Service Request table.

Table 177. Overall Service Request Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category with which the tax is associated. **Important:** A service request header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** A service request header level tax cannot be applied to a price value.
Charge Name	The charge name with which the tax is associated. **Important:** A service request header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** A service request 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.

Remaining Service Request Charges Screen

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

The service request header panel descriptions can be referred from the Service Request table.

- **Adding Remaining Service Request Charges** - From the Charges table, choose the **Add** icon. 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 service request charges and discount charges. Consult your system administrator to determine which charges should be used as service request charges and which should be used as discount charges.

Table 178. Remaining Service Request Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category. Select an option from the drop-down menu.
Charge Name	The name of the charge name. Once the charge category is selected, this field is populated by a drop-down menu. Select the appropriate charge name.
Charge Amount	The amount of the charge that is applied to the header level.

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

- **Modifying Remaining Service 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 screen appears, enter the appropriate reason code and text and click `OK`.

Remaining Service Request Taxes Screen

You can use the Remaining Service Request Taxes window for adding or modifying the order taxes.

The service request header panel descriptions can be referred from the Service Request table.

- **Adding Remaining Service Request Taxes** - From the Taxes panel, choose the **Add** icon. 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.

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

Table 179. Remaining Service Request Taxes Screen, Taxes

Fields	Description
Charge Category	The name of the charge category. Select an option from the drop-down menu.
Charge Name	The name of the charge name. Once the charge category is selected, this field is populated by a drop-down menu. Select the appropriate charge name.
Charge Amount	The amount of the charge that is applied to the header level.
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.

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

- **Modifying Remaining Service Request 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 screen appears, enter the appropriate reason code and text and click `OK`.

Invoiced Service Request Charges Screen

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

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

Order

The service request header panel descriptions can be referred from the Service Request table. If you view the invoiced service request charges screen from the Order Invoices Screen screen the service request header panel is replaced with the fields described in the Invoice table.

Table 180. Invoiced Service Request Charges Screen, Charges

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

Invoiced Service Request Taxes Screen

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

The service request header panel descriptions can be referred from the Service Request table. If you view the invoiced service request taxes screen from the Order Invoices Screen screen the service request header panel is replaced with the fields described in the Invoice table.

Table 181. Invoiced Service Request Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category with which the tax is associated. **Important:** An service requestservice request header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An service request header level tax cannot be applied to a price value.
Charge Name	The charge name with which the tax is associated. **Important:** An service request header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An service request header level tax cannot be applied to a price value.

Table 181. Invoiced Service Request Taxes Screen, Taxes (continued)

Fields	Description
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.

Delivery Request Search By All Attributes Screen

The Delivery Request Search window enables you to view a list of delivery request order lines, based on the search criteria that you supply. In this screen you can search for delivery requests by all attributes.

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 182. Delivery Request Search By All Attributes

Fields	Description
Document Type	**Select the appropriate document type to search.**
Enterprise	**Choose the field and lookup option to find the specific Enterprise you want use.** **Choose Across Enterprises to search across all Enterprises in the system.** **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	**Enter the order number you are searching for, if applicable.**
Buyer	**Enter the Buyer of the delivery requests you want to search for, if applicable.**
Seller	**Enter the Seller of the delivery requests you want to search for, if applicable.**
Item ID	**Enter the item ID to search for orders containing a specific delivery service item, if applicable.**
Appointment	**Enter the appointment date range through which you want to search for service requests, if applicable.**
Max Records	Enter the maximum number of delivery requests you want returned from your search.

Click on `Search` after entering the relevant information and the Delivery Request List Screen screen is displayed.

Delivery Request Search By Draft Orders Screen

The Delivery Request Search window enables you to view a list of delivery request order lines, based on the search criteria that you supply. In this screen you can search for delivery requests by draft orders.

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 183. Delivery Request Search By Draft Orders

Fields	Description
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.** **Choose Across Enterprises to search across all Enterprises in the system.** **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order Number	**Enter the order number you are searching for, if applicable.**
Buyer	**Enter the Buyer of the delivery requests you want to search for, if applicable.**
Seller	**Enter the Seller of the delivery requests you want to search for, if applicable.**
Buyer Account Number	**Enter a Buyer account number to search for delivery requests on draft orders containing a particular Buyer account number, if applicable.**
Max Records	Enter the maximum number of delivery requests you want returned from your search.

Click on `Search` after entering the relevant information and the Delivery Request List Screen screen is displayed.

Delivery Request List Screen

The Delivery Request List window displays the results of a provided service 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 184. Delivery Request List

Actions	Description
View Details	This action takes you to the Delivery Request Details Screen screen where you can view the details of the requests and the associated order lines for the selected delivery requests.
View Instructions	This action takes you to the Delivery Request Instructions Screen screen where you can enter instructions for the selected delivery requests.
More Addresses	This action takes you to the More Delivery Request Addresses Screen screen where you can add, modify or view additional addresses for the selected delivery requests.
Add Line	This action lets you add a product delivery to the request. For more information refer to Additional Product Lines Screen.
Remove Line	This action removes the selected **Draft** delivery requests only.

Table 184. Delivery Request List (continued)

Cancel	This action can be used to remove the selected delivery requests.
Fields	
Order #	The sales order associated with the delivery request.
Line #	The line number of the delivery request in the sales order. Click this link to view the Delivery Request Details Screen screen.
Status	The status of the delivery request.
Enterprise	The enterprise owner of the order.
Appointment	This field provides the appointment date and time of the delivery request.
Total Amount	The total cost involved for this delivery request.

Delivery Request Details Screen

The Delivery Request details screen displays all product items associated with a specific delivery request.

Table 185. Delivery Request Details Screen, Delivery Request

View Icons	Description
Work Orders	**View Work Order** - This icon takes you to the Work Order Details screen where you can view the related work order associated with this delivery request.
Instructions	**Instructions** - This icon lets you view the Delivery Request Instructions Screen screen where you can add, modify the instructions for the delivery request.
Address	**More Addresses** - This icon takes you to the More Delivery Request Addresses Screen screen where you can add or modify addresses.
Shipment Data Types	**Delivery Request Dates** - This icon takes you to the Delivery Request Dates Screen screen to view the requested, expected and actual date type for the given request.
Chained Orders	**Related Order Lines**- This icon lets you view the Viewing an Order Line's Chained Order Lines screen. For example you can view the Return Orders created from the order console by clicking this icon.
Additional Attributes	**Additional Attributes** - This icon takes you to the Delivery Request Additional Attributes Screen screen where you can specify additional attributes for fulfillment.
Actions	
Cancel	Select this action to cancel the delivery request. It pops up a Modification Reason screen where you should enter the reason and code before cancelling the delivery request.
Add Line	This action takes you to the Additional Product Lines Screen screen where you can add any product lines to the delivery request.
Fields	
Order Number	The unique identifier of the order. Click this link to view the Order Detail Screen screen.

Table 185. Delivery Request Details Screen, Delivery Request (continued)

Item ID	The delivery service item's ID.
Description	The description of the delivery service.
Appointment	The date and time of the delivery.
Line Number	The line number of the delivery service.
UOM	The units of measure in which the delivery service is calculated.
Ship Node	The node that carries out the delivery.
Status	The status of the delivery request.
Line Quantity	The quantity used to measure the delivery service. If the delivery request is not associated with a product line, you can edit the quantity by entering a new value and clicking Save.
Document Type	The document type associated with the delivery request.

Table 186. Charges and Taxes

Fields	Description
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 Delivery Request Charges Screem, Remaining Delivery Request Charges Screen and Invoiced Delivery Request Charges Screen.
Charges	The total charges applied to the associated line. Click the hyperlink to view the Overall Delivery Request Charges Screem, Remaining Delivery Request Charges Screen and Invoiced Delivery Request Charges Screen.
Tax	The total taxes applied to the order line. Click the hyperlink to view the Overall Delivery Request Taxes Screen, Remaining Delivery Request Taxes Screen and Invoiced Delivery Request Taxes Screen.
Totals	The total amount of the associated line after any charges and taxes have been applied.

Table 187. Options

Fields	Description
The Options table displays only when a delivery service has any optional services available, such as clean up or old appliance removal. If the delivery request is not associated with a product line, you can add or remove options using the checkboxes, and clicking Save.	
Option ID	The option's ID
Description	The option's description.
Quantity	The quantity of the option.
Price	The option's price.

For more information about viewing the shipping address details, see Table 13 on page 34.

Table 188. Delivery Request Detail Screen, Associated Lines

Action	Description
Remove Association	This action pops up the Modification Reason Screen screen to enter the relevant reason and code before removing the association with the order line.
Fields	
Line Number	The delivery item's line number. Click this link to view the Order Line Detail Screen screen.
Item ID	The order 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 order line item's unit of measure.
Description	The order line item's description.
Line Quantity	The quantity of the line item ordered.
Total Amount	The order line item's total amount.
Status	The current status for that part of the order line.

For a delivery request that is not associated with a product line, this panel does not contain any lines.

Additional Product Lines Screen

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

Table 189. Delivery Request

Fields	Description
Order Number	The unique identifier of the order. Click this link to view the Order Detail Screen screen.
Item ID	The delivery service item's ID.
Description	The description of the delivery service.
Appointment	The date and time of the delivery.
Line Number	The line number of the delivery service.
UOM	The units of measure in which the delivery service is calculated.
Ship Node	The node that carries out the delivery.
Status	The status of the delivery request.
Line Quantity	The quantity used to measure the delivery service.
Document Type	The document type associated with the delivery request.

Table 190. Additional Product Lines Screen, Order Lines

Action	Description

Table 190. Additional Product Lines Screen, Order Lines (continued)

Add To Delivery Request	This action lets you add the selected order lines to the delivery request. A Modification Reason Screen 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.

Delivery Request Instructions Screen

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

The delivery request header field descriptions can be referred from the Delivery Request table descriptions.

Table 191. Instructions Window

Action	Description
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 **Instructions URL** icon.

You can also use the Instructions window for:

- Adding an Instruction - Select the **Add** 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 **Instructions** icon appears in the corresponding delivery request line in the Order Detail Screen screen.

More Delivery Request Addresses Screen

About this task

You can view any additional addresses that pertain to a delivery request as per your business practices. For more information about defining additional address types, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

The delivery request header panel can be referred from the Delivery Request table.

In this screen locate the address you want to modify and choose the **Address Details** icon. The Modify Address window appears. Modify the applicable information and click OK.

Delivery Request Dates Screen

You can view any custom dates that have been configured for monitoring. For more information about monitoring, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

The delivery request header field descriptions can be referred from the Delivery Request table.

Table 192. Delivery Request Dates Screen, New Date

Fields	Description
Date Type	The custom date type.
Requested	The date this date type has been requested to be met.
Expected	The date this date type is expected to be met.
Actual	The date this date type is to be met.

Delivery Request Additional Attributes Screen

You can set the fulfillment type for a delivery request. The fulfillment type is used to determine if there are any custom requirements used to determine sourcing locations associated with this order. For example, you are creating an order for a special free delivery promotion. According to your business practices, the delivery service involved with this promotion is to be sourced from a particular node called Node 1. To handle this scenario, a fulfillment type called 'Promotion' has been defined and a sourcing rule has been configured to source all delivery services with a fulfillment type of Promotion from Node 1. For more information about fulfillment types and sourcing rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

The delivery request header field descriptions can be referred from the Delivery Request table descriptions.

Table 193. Additional Attributes

Field	Description
Fulfillment Type	Select the fulfillment type associated with this delivery request.

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Overall Delivery Request Charges Screen

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

The delivery request header panel descriptions can be referred from the Delivery Request table.

Table 194. Overall Delivery Request Charges Screen, Charges

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

Overall Delivery Request Taxes Screen

You can view the header level tax information associated with a delivery request.

The delivery request header panel descriptions can be referred from the Delivery Request table.

Table 195. Overall delivery request Taxes Screen, Taxes

Fields	Description
Charge Category	The charge category with which the tax is associated. **Important:** A delivery request header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** A delivery request header level tax cannot be applied to a price value.
Charge Name	The charge name with which the tax is associated. **Important:** A delivery request header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** A delivery request 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.

Remaining Delivery Request Charges Screen

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

The delivery request header panel descriptions can be referred from the Delivery Request table.

- **Adding Remaining Delivery Request Charges** - From the Charges table, choose the **Add** icon. 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 delivery request charges and discount charges. Consult your system administrator to determine which charges should be used as delivery request charges and which should be used as discount charges.

Table 196. Remaining Delivery Request Charges Screen, Charges

Fields	Description
Charge Category	The name of the charge category. Select an option from the drop-down menu.
Charge Name	The name of the charge name. Once the charge category is selected, this field is populated by a drop-down menu. Select the appropriate charge name.
Charge Amount	The amount of the charge that is applied to the header level.

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

- **Modifying Remaining Delivery 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 screen appears, enter the appropriate reason code and text and click `OK`**.**

Remaining Delivery Request Taxes Screen

You can use the Remaining Delivery Request Taxes window for adding or modifying the order taxes.

The delivery request header panel descriptions can be referred from the Delivery Request table.

- **Adding Remaining Delivery Request Taxes** - From the Taxes panel, choose the **Add** icon. 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.

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

Table 197. Remaining Delivery Request Taxes Screen, Taxes

Fields	Description
Charge Category	The name of the charge category. Select an option from the drop-down menu.
Charge Name	The name of the charge name. Once the charge category is selected, this field is populated by a drop-down menu. Select the appropriate charge name.
Charge Amount	The amount of the charge that is applied to the header level.
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.

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

- **Modifying Remaining Delivery Request 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 screen appears, enter the appropriate reason code and text and click `OK`.

Invoiced Delivery Request Charges Screen

You can view the invoice level charges of an delivery request in this screen.

Note: This window displays all delivery request charges and discount charges against the delivery request header.

Order

The delivery request header panel descriptions can be referred from the Delivery Request table. If you view the invoiced delivery request charges screen from the Order Invoices Screen screen the delivery request header panel is replaced with the fields described in the Invoice table.

Table 198. Invoiced Delivery Request Charges Screen, Charges

Fields	**Description**
Charge Category	The name of the charge category.
Charge Name	The name of the charge name.
Charge Amount	The amount of the charge that is applied to the header level.

Invoiced Delivery Request Taxes Screen

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

The delivery request header panel descriptions can be referred from the Delivery Request table. If you view the invoiced delivery request taxes screen from the Order Invoices Screen screen the delivery request header panel is replaced with the fields described in the Invoice table.

Table 199. Invoiced Delivery Request Taxes Screen, Taxes

Fields	**Description**
Charge Category	The charge category with which the tax is associated. **Important:** An delivery requestdelivery request header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An delivery request header level tax cannot be applied to a price value.
Charge Name	The charge name with which the tax is associated. **Important:** An delivery request header level tax must be associated with a charge, otherwise it is calculated as 0. **Note:** An delivery request 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.

Table 199. Invoiced Delivery Request Taxes Screen, Taxes (continued)

Fields	Description
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.

History Order Details Screen

About this task

To view sales history order details:

Procedure

1. From the navigation bar, select Order.
2. Choose the Order Console. The Order Search window appears.
3. Search for the applicable history orders.
4. From the list, select the check boxes of the applicable history orders.
5. From the action bar, choose View Details. The History Order Detail window appears.

Results

All actions that result in the order modification or status change are not allowed for history orders. Modifications to an order are only allowed after restoring a history order.

Modification Reason Screen

When you modify any information in the order console screen and click Save, the 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 Distributed Order Management node of the Applications Manager. For more information about specifying the reason codes, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Table 200. Modification Reason

Fields	Description
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 Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.
Reason Text	Enter the reason text for the modification.

Organization Details Screen

You can view an organization's details.

Table 201. Organization Details

Field	Description
Organization Information	

Table 201. Organization Details (continued)

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

Organization Address Details Screen

You can modify shipto, billto, forwardto and any additional addresses in this screen.

Table 202. Address Details

Fields	Description
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.

Table 202. Address Details (continued)

Fields	**Description**
State	The state.
Postal Code	The postal code.
Country/Region	The country or region.

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 Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

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

Chapter 11. Create Outbound Shipment Screens

Create Outbound Shipment Screens

Shipments (ASN) are transmitted to warehouses through EDI downloads, fax, or e-mail, and also when a trailer arrives with no prior notice.

The shipment entry console enables you to manually create shipments from fax, e-mail or telephone conversations, and also for those trailers that arrive with no prior notice.

Shipment Entry for Outbound Shipments

You can create outbound shipments for a sales or transfer order in this screen.

Table 203. Shipment Entry

Action	Description
Supervisory Overrides	This action takes you to the Shipment Supervisory Overrides for Outbound Shipments screen where you can specify whether the shipment can have overages.
Fields	
Document Type	Select the document type associated with the shipment you are creating. Valid values are 'Sales Order' or 'Transfer Order'. For an outbound shipment, valid value is 'Sales Order'
Ship Node	The shipping node associated with the shipment. This represents the seller's ship node.
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.
Receiving Node	Select node where the receipt is being performed.
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.
Order #	Enter the order number, if there is only order on the shipment.
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.
Carrier/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.

Table 203. Shipment Entry (continued)

Action	Description
Trailer#	Enter the trailer number of the shipment you are creating, if applicable.

After entering the relevant information in the fields a shipment is created and you are taken to the Shipment Details screen.

Shipment Supervisory Overrides for Outbound Shipments

This screen allows you to create overages for the shipment being created.

Table 204. Shipment Supervisory Overrides

Field	Description
Allow Overage	Select to allow overage for the outbound shipment.

Chapter 12. Outbound Shipment Console Screens

Outbound Shipment Console Screens

The Outbound Shipment Console provides:

- Extensive search capabilities using granular level information such as plan #, customer PO#.
- Ability to modify outbound shipment instruction.
- Ability to view discrepancies found in the outbound shipments.

Outbound Shipment Search By Status

You can search for shipments that fall under a particular status with the help of this screen.

Table 205. Shipment Search By Status

Fields	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the section Defining Teams in the chapter Configuring User Security of the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Shipment #	Enter the shipment number to search for, if applicable.
Order #	Enter the order number you are searching for, if applicable.
Customer PO #	Enter the number of the customer's purchase order number you are searching for, if applicable.
Plan #	Enter the plan number the outbound shipment you are searching for belongs to, if applicable.
Origin Node	Enter the origin node you want to search for outbound shipments under, if applicable.
Destination Node	Enter the destination node you want to search for outbound shipments under, if applicable.
Status	Select the status range of the outbound shipments you want to search for, if applicable.
Include Closed Shipments	Select this if you want to search for outbound shipments that have been closed, as well as those that are open, if applicable.
Pack And Hold Shipment	Select this if you want to search for outbound shipments that are packed and kept on hold, if applicable.
Held Shipments	Check this box if you want to search for outbound shipments that are held.

Table 205. Shipment Search By Status (continued)

Fields	Description
Max Records	Enter the maximum number of outbound shipments you want returned from your search.

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

The "Shipment List" on page 158 screen displays as a result of outbound shipment search by status.

Outbound Shipment Search By Date

You can search for shipments that fall within a particular date range with the help of this screen.

Table 206. Shipment Search By Date

Fields	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the section Defining Teams in the chapter Configuring User Security of the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Carrier/Service	Choose the Carrier/Service you want to search for outbound shipments under, if applicable.
Status	Choose the shipment status you are searching for, if applicable.
Enter Shipment Dates	Enter the requested ship date range, expected ship date range, actual ship date range you want to search for outbound shipments through, if applicable.
Enter Delivery Dates	Enter the requested delivery date range, expected delivery date range, actual delivery date range you want to search for outbound shipments through, if applicable.
Max Records	Enter the maximum number of outbound shipments you want returned from your search.

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

The "Shipment List" on page 158 screen displays as a result of outbound shipment search by date.

Outbound Shipment Search By Carrier

You can search for shipments that belong to a particular carrier with the help of this screen.

Table 207. Shipment Search By Carrier

Fields	Description
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. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the section Defining Teams in the chapter Configuring User Security of the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Shipment Mode	Select the shipment mode, if applicable
Carrier/Service	The Carrier/Service you want to search for outbound shipments under, if applicable.
BOL #	The bill of lading number of the outbound shipments you are searching for, if applicable.
PRO #	The PRO number of the outbound shipments you are searching for, if applicable.
Trailer #	The trailer number of the outbound shipments you are looking for, if applicable.
Status	Select the shipment status you are searching for, if applicable.
Requires Routing	Choose this option if the shipment requires dynamic routing.
Max Records	The maximum number of outbound shipments you want returned from your search.

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

The “Shipment List” on page 158 screen displays as a result of outbound shipment search by carrier.

Outbound Shipment Search By Item

You can search for shipments based on the item information such as product class, unit of measure, item ID and so on.

Table 208. Shipment Search By Item

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.

Table 208. Shipment Search By Item (continued)

Fields	Description
Enterprise	Choose the field and lookup option to find the specific Enterprise you want to use. Choose Across Enterprises to search across all Enterprises in the system. **Note:** If you belong to a team, the system only searches across the Enterprises allowed by that group. For more information about teams, see the section Defining Teams in the chapter Configuring User Security of the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Item ID	The item ID.
Product Class	The item's product class.
Unit of Measure	The item's unit of measure.
Buyer	The identifier for the Buyer.
Seller	The identifier for the Seller.
Status	Select the shipment status you are searching for, if applicable.
Include Closed Shipments	Select this if you want to search for outbound shipments that have been closed, as well as those that are open, if applicable.
Has Hazardous Items	Select this check box to search for outbound shipments that contain hazardous items, if applicable.
Max Records	The maximum number of outbound shipments you want returned from your search.

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

The "Shipment List" on page 158 screen displays as a result of outbound shipment search by item.

Outbound Shipment Search By Wave

You can search for outbound shipment that fall within a particular wave in this screen.

Table 209. Shipment Search By Wave

Fields	Description
Document Type	Select the document type to you want to search for, if applicable.
Enterprise	Select the enterprise for which you are searching.
Across Enterprise	Select this option if you are searching across all enterprises.
Shipment #	Enter the shipment number you are searching for, if applicable.
Wave #	Enter the wave number you are searching for, if applicable.
Load #	Enter the load number you are searching for, if applicable.
Carrier/Service	Select the carrier/service you are searching for, if applicable.

Table 209. Shipment Search By Wave (continued)

Fields	Description
Buyer	Enter the buyer associated with the shipment you want to search for, if applicable.
Status	Select the shipment status you are searching for, if applicable.
Shipment In Wave	Choose this option if you are searching for the shipments in wave.
Shipment Not In Wave	Choose this option if you are searching for the shipments not in wave.
Ignore Cancelled Shipment Lines	Select this check box if you are considering only Shipment Lines with quantity greater than zero. This check box displays only when "Shipment Not In Wave" is selected.
All	Choose this option if you are searching for all the shipments.
Has Shortage	Choose this option
Enter Shipment Dates	Choose to enter shipment date range you want to search for outbound shipments, if applicable.
Enter Delivery Dates	Choose to enter delivery date range you want to search for outbound shipments, if applicable.
Max Record	Enter the maximum number of records you want listed as a result of your search.

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

The “Shipment List” on page 158 screen displays as a result of outbound shipment search by wave.

Outbound Shipment Search By Profiling

The warehouse supervisor can choose the pick strategy based on the profile identifier density of the shipments. Usually, large shipments are picked individually and small shipments are group together and picked together, and sorted later.

You can search for shipments based on their profile identifiers.

Table 210. Shipment By Profile Search

Fields	Description
Enterprise	Select the enterprise.
Profile ID	Select the profile ID from the drop down list. You can also click the **Lookup** icon to select the Profile ID.
Consider Profiles	Select this to view the shipment's state There are three options: Already In Wave - Select this to view the shipments that are in wave. Not In Wave - Select this to view the shipments that are not in wave. All - Select this to view all the shipments.

Table 210. Shipment By Profile Search (continued)

Fields	Description
Show Profiles	Select to view the More number of Shipment First and Less number of Shipment First. There are two options: More number of Shipment First - Select this to view high-density profile ID shipments first. Less number of Shipment First - Select this to view low-density profile ID shipments first.
Max Records	Enter the number to display the maximum records.

You can view the shipment profile list based on the profile identifiers.

Table 211. Shipment Profile List

Actions	Description
Create Wave	This takes you to the Create Wave screen, where you can create a wave for the selected shipment group.
Fields	
ProfileId	The identifier of a shipment.
No of shipments	The number of shipments.
No of shipments in the wave	The number of waved shipments.
No of shipments not in the wave	The number of shipments that are not waved.

Shipment List

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

Table 212. Shipment List

Actions	Description
View Details	This action takes you to the Shipment Details screen where you can view the shipment details.
Modify Shipment	This action takes you to the Modify Shipment screen where you can modify a shipment.
Print	This action takes you to the Print screen where you can print the shipment's documents or labels.
Cancel	This action takes you to the Cancel Selected Shipments screen where you can cancel an outbound shipment.
Create Wave	This action takes you to the Create Wave screen where you can create wave for the selected shipment group.
Add To Delivery Plan	This action takes you to the Select Delivery Plan screen where you can add shipment to a delivery plan.
Delete Shipment	This action allows you to delete the selected shipments.

Table 212. Shipment List (continued)

Actions	Description
Remove From Wave	This action allows you to remove the selected shipments from a wave.
View Holds	This action takes you to the View Holds screen where you can view the holds applied to the outbound shipment.
Fields	
Shipment #	The shipment number.
Status	The shipment status.
Buyer	The identifier for the buyer.
Carrier/Service	The Carrier and Carrier service use to ship the outbound shipments.
Expected Ship Date	The date the shipment is estimated to ship on.
Origin	The shipment's origin node.
Destination	The shipment's destination node.
Total Weight	The total weight of the outbound shipment.
Total Volume	The total volume of the outbound shipment.
Tag/Serial Requested	Indicates if tag or serial details exist for the outbound shipment. **Note:** The tag details for a tag-controlled item displays, if the ship node is configured to capture tags in all operations performed within the node, or if the buyer on a shipment mandates it as a part of their inbound compliance. For more information about capturing tag attributes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

Shipment Details

The Shipment Details screen provides shipment information for the selected shipments. The actions that you can perform in the Shipment Details screen are explained in the following tables.

Table 213. Shipment Details, Shipment

View Icons	Description
Load	This icon takes you to the Shipment Loads screen where you can view any load carrying an outbound shipment.
Containers	This icon takes you to the Shipment Containers screen where you can view all packed containers included in the outbound shipment.
Instructions	This icon takes you to the Shipment Instructions screen where you can add, modify or delete the instructions for a shipment.
Audit	This icon takes you to the Shipment Audits screen where you can view audit trail for shipment modifications.

Table 213. Shipment Details, Shipment (continued)

View Icons	Description
Shipment Data Types	This icon takes you to the Shipment Dates screen where you can view and modify outbound shipment dates and delivery dates.
Alert	This icon takes you to the Alerts screen where you can view the alerts for an outbound shipment.
Additional Attribute	This icon takes you to the Additional Attributes screen where you can view additional attributes for the selected shipment.
Activity Demand	This icon takes you to the Shipment Activity Demand screen where you can view the shipment's activity demand.
Actions	
Confirm Shipment	This action allows you to manually confirm an outbound shipment, if the shipment is not automatically confirmed.
Pack Containers	This action takes you to the Pack Containers screen where you can pack any unpacked items into containers for shipping.
Print	This action takes you to the Print screen where you can print the shipping documents or labels.
Cancel	This action takes you to the Cancel Selected Shipments screen where you can cancel an outbound shipment.
Create Pick List	This action enables you to create a picklist for the selected shipments, if applicable.
Split Shipment	This action takes you to the Split Shipment screen where you can split an outbound shipment.
Create Alert	This action takes you to the Create Alerts screen where you can create an alert for the shipment.
Release From ESP Hold	This action allows you to release a shipment from the ESP Hold.
Remove From Wave	This action allows you to remove the shipment from a wave.
View Holds	This action takes you to the View Holds screen where you can view the holds applied to the outbound shipment.
Fields	
Shipment #	The outbound shipment number.
Shipper's Ref. #	Enter the outbound shipment reference number.
Plan #	The delivery plan number the outbound shipment is associated with, if applicable.
Enterprise	The Enterprise associated with the shipment.
Buyer	Indicates the buyer associated with the shipment. Click this link to go to the Organization Details to view the buyer organization details.
Seller	Indicates the seller associated with the shipment. Click this link to go to the Organization Details to view the seller organization details.

Table 213. Shipment Details, Shipment (continued)

View Icons	Description
Ship Node	The node from where the outbound shipment ships. Click this link to go to the Ship Node Detail screen to view the node details for the shipment.
Receiving Node	Indicates the node that is receiving the outbound shipment. Click this link to go to the Ship Node Detail screen to view the shipment's receiving node details.
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits to view shipment status audits. Click the **Work Order Hold** icon to go to the View Holds screen where you can view holds that are applied to the outbound shipment.
Has Hazardous Items	Indicates if the outbound shipment contains hazardous items.
Break Bulk Node	This field displays only if the shipment belongs to a break bulk load. The break bulk node that is receiving the break bulk load displays.

Table 214. Shipment Details, Execution Attributes

Actions	Description
View Tasks	This action takes you to the Task List screen where you can view a list of tasks associated with the shipment.
Fields	
Execution Status	The status of wave corresponding to the shipment.
Pack And Hold	Select the check box to pack and hold the outbound shipment, if applicable.
Shipment Sort Lane	The lane where containers are sorted by shipment, when 'Sort by Shipment' option is chosen.
Carrier Sort Lane	The lane where containers are sorted by carrier, when 'Sort by Carrier' option is chosen.
Wave #	The wave number to which the outbound shipment belongs to.
Has Shortage	Indicates if the outbound shipment has inventory shortage when included in the wave.
Packed Quantity	Indicates the total quantity packed.

Table 215. Shipment Details, Ship To

View Icon	Icon Name	Description
Address Details		Choose this icon to view or modify the Ship To addresses. For more information about the screen, see Address Details.
The name and address of the person or organization where the shipment is shipped.		

Table 216. Shipment Details, Totals

Fields	Description
Weight	Enter the total weight associated to the shipment in the appropriate UOM.
Volume	Enter the total volume associated to the shipment in the appropriate UOM.
No. of Containers	Displays the total number of containers available in the shipment.

Table 217. Shipment Details, Carrier Info

Actions	Description
Manage Special Services	This action takes you to the Special Services List screen where you can select special services for the carrier.
Fields	
Delivery Method	The delivery method for the shipment.
Ship Mode	Select the shipment mode for the shipment. Values include 'LTL', 'TL', 'PARCEL'
Carrier/Service	Select the carrier service for the outbound shipment.
Trailer #	Enter the outbound shipment's trailer number.
BOL #	Enter the outbound shipment's bill of lading number.
Seal #	Enter the outbound shipment's seal number.
Pro #	Enter the PRO number assigned by the carrier to track the shipment.
Routing Source	Indicates if the routing was either pre-assigned, by the system or through an external system.
Load #	The outbound shipment's load number.
Routing Error Code	The system automatically displays the routing error code, if applicable.
Requested Carrier Service	The requested carrier service for the outbound 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.
Is Revised	Indicates whether the Ship To address has changed since the creation of the outbound shipment.
Return Carrier Service	Select the carrier service for the return shipment from the drop-down list. **Note:** If you do not select the carrier service for the return shipment from the drop-down list, the carrier service used for an outbound shipment is used for the return shipment.

Table 218. Shipment Details, Charges

View Icon	
Charges and Taxes	**Charges - This icon takes you to the Charges screen where you can enter or modify additional charges imposed to the shipment and/or container.**
Fields	
Carrier Account #	Indicates the carrier account # for the shipment.
Freight Terms	Indicates the freight terms used for the shipment. Valid values include COLLECT, PREPAID, TP-COLLECT and TP-PREPAID.
COD Pay Method	Select the COD payment type for the carrier.
Estimated Shipment Charges	The estimated charge for shipping the outbound shipment.
Actual Shipment Charges	The actual charge for shipping the outbound shipment.
Freight Charge	The charge applied by the carrier for shipping the outbound shipment.

Table 219. Shipment Details, Shipment Lines

Actions	Description
View Details	This action takes you to the Shipment Line Details screen where you can view the shipment line attributes for the selected shipments.
Add Release	This action takes you to the Add Release screen where you can add an order release line to include in the shipment.
Remove Line	This action allows you remove the selected shipment lines from the shipment.
Fields	
Shipment Line #	Enter the outbound shipment line number. Click this link to go to the Shipment Line Details screen to view the shipment line attributes for the a shipment. The **Kit Components** icon - This icon takes you to the Logical Kits screen where you can view the item kit components for the shipment line.
Order #	Enter the order number being received on the shipment, if applicable.
Line #	Enter the order line number being received on the shipment, if applicable.
Release #	Enter the release number, if applicable
Item ID	Enter the item ID for the SKU.
Description	The item's description
PC	Select the product class for the item.
UOM	Select the unit of measure for the item.
Requested Serial #	The serial number requested in the order. Editable if the order is not available on the system.
Mark For	The mark for address associated with the item.

Table 219. Shipment Details, Shipment Lines (continued)

Actions	Description
Quantity	Number of requested units of the item included in the shipment.
Over Ship Quantity	Indicates quantity of an item over shipped.
Shortage Qty	Indicates the shortage quantity on the order for the item.
Original Qty	Indicates the original quantity on the order for the item.

Special Services List

You can select the applicable special services for a carrier.

Table 220. Special Services List

Fields	Description
Special Services	Check the applicable special services for the carrier and click Save. Valid values are: • Declared Value Insurance • Ship Notification • Adult Signature Required • Delivery Confirmation • Saturday Delivery • Signature Required • Saturday Pickup • Tagless COD • Return Shipping Label Required

Modify Shipment

You can modify a shipment in this screen.

Table 221. Modify Shipment

Fields	Description
Carrier/Service	Select the carrier and carrier service used to ship the outbound shipment.
Expected Ship Date	The date the shipment is estimated to ship on.
Shipment Sort Lane	The lane where containers are sorted by shipment, when 'Sort by Shipment' option is chosen.
Carrier Sort Lane	The lane where containers are sorted by carrier, when 'Sort by Carrier' option is chosen.

Address Details

You can modify an outbound shipment or container ship to address in this screen.

Table 222. Address Details

Fields	Description
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/Region	The country or region.
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.

Charges

You can modify additional charges imposed to the shipment and/or container in this screen.

Table 223. Charges, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.
Plan #	The delivery plan number the outbound shipment is associated with, if applicable.
Enterprise	The Enterprise associated with the shipment.
Buyer	The identifier for the Buyer.
Seller	The identifier for the Seller.
Ship Node	The node from where the outbound shipment ships.
Receiving Node	Indicates the node that is receiving the outbound shipment. Click this link to go to the Ship Node Detail screen to view the shipment's receiving node details.

Table 223. Charges, Shipment (continued)

Fields	Description
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits to view shipment status audits.
Has Hazardous Items	Indicates if the outbound shipment contains hazardous items.

Table 224. Charges, Shipment Charges

FieldsDescription	Description
Charge Category/Charge Name	The name of the additional outbound shipment charge.
Estimated Charge	The estimated additional charge for the outbound shipment.
Actual Charge	The actual additional outbound shipment charge.

Table 225. Charges, Container Charges

Fields	Description
Container #	The container number.
Actual Freight Charge	The Carrier's freight charge for shipping the container.

Shipment Loads

You can view any load carrying an outbound shipment with the help of this screen.

Table 226. Loads, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.
Plan #	The delivery plan number the outbound shipment is associated with, if applicable.
Enterprise	The Enterprise associated with the shipment.
Buyer	The identifier for the Buyer.
Seller	The identifier for the Seller.
Ship Node	The node from where the outbound shipment ships.
Receiving Node	The node that is receiving the outbound shipment.
Status	The outbound shipment status.
Has Hazardous Items	Indicates if the outbound shipment contains any hazardous item.

Table 227. Loads, Loads

Actions	Description
View Details	The actions lets you view the load details.
Fields	
Load #	The load number the outbound shipment belongs to.
Load Type	The load type as per your business practices.

Table 227. Loads, Loads (continued)

Actions	Description
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.

Shipment Containers

You can view the packed containers included in an outbound shipment in this screen.

Table 228. Shipment Containers, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.
Plan #	The delivery plan number the outbound shipment is associated with, if applicable.
Enterprise	The Enterprise associated with the shipment.
Buyer	The identifier for the Buyer.
Seller	The identifier for the Seller.
Ship Node	The node from where the outbound shipment ships.
Receiving Node	The node that is receiving the outbound shipment.
Status	The outbound shipment status.
Has Hazardous Items	Indicates if the outbound shipment contains any hazardous item.

Table 229. Shipment Containers, Containers

Actions	Description
View Details	This action takes you to the Container Details screen where you can view the container details.
Delete Containers	This action takes you to the Delete Selected Containers where you can delete the selected containers from the shipment.
Modify Containerization	This action takes you to the Modify Containerization screen.
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 net weight.
Gross Weight	The container's total weight (including packaging).
Freight Charge	The charge applied by the Carrier for shipping the container.
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment's status audits.

Table 229. Shipment Containers, Containers (continued)

Actions	Description
Manifested	Indicates whether the container is manifested.

Shipment Instructions

You can view special instructions pertaining to an outbound shipment, such as handling instructions in this screen.

Table 230. Shipment Instructions, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.
Plan #	The delivery plan number the outbound shipment is associated with, if applicable.
Enterprise	The Enterprise associated with the shipment.
Buyer	The identifier for the Buyer.
Seller	The identifier for the Seller.
Ship Node	The node from where the outbound shipment ships.
Receiving Node	Indicates the node that is receiving the outbound shipment. Click this link to go to the Ship Node Detail screen to view the shipment's receiving node details.
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits to view shipment status audits.
Has Hazardous Items	Indicates if the outbound shipment contains hazardous items.

Table 231. Shipment Instructions, Instructions

Actions	Description
Delete Instruction	This actions lets you delete the selected shipment instructions.
Fields	
Instruction Type	The type of instruction, such as Gift, Pick, Pack, Ship, or Other. This field can be modified.
Text	The specific instructions to be performed on the order line. This field can be modified.

Shipment Status Audits

You can view any status modifications performed against an outbound shipment status in this screen.

Table 232. Shipment Status Audits, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.

Table 232. Shipment Status Audits, Shipment (continued)

Fields	Description
Plan #	The delivery plan number the outbound shipment is associated with, if applicable. Click this link to go to the Select Delivery Plan screen where you can add an outbound shipment to a delivery plan.
Enterprise	The Enterprise associated with the shipment.
Buyer	The identifier for the Buyer. Click this link to go to the Organization Details screen where you can view the buyer organization details.
Seller	The identifier for the Seller. 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 outbound shipment ships. Click this link to go to the Ship Node Detail screen where you can view the node details for the shipment.
Destination	The outbound shipment's destination.
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment's status audits.

Table 233. Shipment Status Audits, Shipment Status Audits

Fields	Description
Modified By	The user who performed the modification.
Old Status	The outbound shipment status before the status modification.
Old Status Date	The date the outbound shipment entered the old status.
New Status	The outbound shipment status after the status modification.
New Status Date	The date the status modification was made.
Reason Code	The reason for the modification.
Reason Text	Additional information as to why the modification was made.

Shipment Dates

You can change dates pertaining to the outbound shipment, such as shipment dates and delivery dates in this screen.

Table 234. Shipment Dates, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.
Plan #	The delivery plan number the outbound shipment is associated with, if applicable. Click this link to go to the Select Delivery Plan screen where you can add an outbound shipment to a delivery plan.
Enterprise	The Enterprise associated with the shipment.
Buyer	The identifier for the Buyer. Click this link to go to the Organization Details screen where you can view the buyer organization details.

Table 234. Shipment Dates, Shipment (continued)

Fields	Description
Seller	The identifier for the Seller. 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 outbound shipment ships. Click this link to go to the Ship Node Detail screen where you can view the node details for the shipment.
Receiving Node	The node that is receiving the outbound shipment.
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment's status audits.
Has Hazardous Items	Indicates if the outbound shipment contains any hazardous item.

Table 235. Shipment Dates, System Dates

Fields	Description
Requested Shipment Date	The requested shipment date.
Expected Shipment Date	The expected shipment date.
Actual Shipment Date	The actual shipment date.
Requested Delivery Date	The requested delivery date.
Expected Delivery Date	The expected delivery date.
Actual Delivery Date	The actual delivery date.

Table 236. Shipment Dates, New Dates

Fields	Description
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.

Alerts

You can view shipment alerts in this screen.

Table 237. Shipment Alerts, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.
Plan #	The delivery plan number the outbound shipment is associated with, if applicable. Click this link to go to the Select Delivery Plan screen where you can add an outbound shipment to a delivery plan.
Enterprise	The Enterprise associated with the shipment.

Table 237. Shipment Alerts, Shipment (continued)

Fields	Description
Buyer	The identifier for the Buyer. Click this link to go to the Organization Details screen where you can view the buyer organization details.
Seller	The identifier for the Seller. 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 outbound shipment ships. Click this link to go to the Ship Node Detail screen where you can view the node details for the shipment.
Receiving Node	The node that is receiving the outbound shipment.
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment's status audits.
Has Hazardous Items	Indicates if the outbound shipment contains any hazardous item.

Table 238. Shipment Alerts, Alert List

Actions	Description
View Details	This action allows you to view alert details. For more information about alerts, see the *Sterling Selling and Fulfillment Foundation: Application Platform User Guide*.
Fields	
Alert ID	The alert ID.
Type	The type of alert raised. For example, ON_FAILURE or FAILED_AUTH. For more information about alerts, see the *Sterling 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.

Additional Attributes

You can view shipment additional attributes in this screen.

Table 239. Additional Attributes, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.
Plan #	The delivery plan number the outbound shipment is associated with, if applicable. Click this link to go to the Select Delivery Plan screen where you can add an outbound shipment to a delivery plan.
Enterprise	The Enterprise associated with the shipment.

Table 239. Additional Attributes, Shipment (continued)

Fields	Description
Buyer	The identifier for the Buyer. Click this link to go to the Organization Details screen where you can view the buyer organization details.
Seller	The identifier for the Seller. 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 outbound shipment ships. Click this link to go to the Ship Node Detail screen where you can view the node details for the shipment.
Receiving Node	Indicates the node that is receiving the outbound shipment.
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment's status audits.
Has Hazardous Items	Indicates if the outbound shipment contains hazardous items.

Table 240. Additional Attributes, Additional Attributes

Fields	
Overage Allowed	Indicates whether the overage is allowed. For outbound shipments, overage means shipping more than was initially intended in a shipment. For inbound shipments, overage means receiving more than the expected quantity in a shipment.
Manually Entered	Indicates whether the shipment was manually entered, or generated automatically.
Order Available On System	Indicates whether the order that is associated with the shipment is available in Sterling Selling and Fulfillment Foundation, or if it only exists in an external system.
Case Content Verification Not Required	Indicates whether the case content verification is required for this shipment.
Pallet Content Verification Not Required	Indicates whether the pallet content verification is required for this shipment.
Shipment Entry Overridden	Indicates whether the shipment entry is allowed.
Gift	Indicates whether the shipment line is a gift.

Shipment Activity Demand

You can view activity demand for the selected outbound shipments in this screen.

Table 241. Shipment Activity Demand

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.
Plan #	The delivery plan number the outbound shipment is associated with, if applicable. Click this link to go to the Select Delivery Plan screen where you can add an outbound shipment to a delivery plan.

Table 241. Shipment Activity Demand (continued)

Fields	Description
Enterprise	The Enterprise associated with the shipment.
Buyer	The identifier for the Buyer. Click this link to go to the Organization Details screen where you can view the buyer organization details.
Seller	The identifier for the Seller. 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 outbound shipment ships. Click this link to go to the Ship Node Detail screen where you can view the node details for the shipment.
Receiving Node	Indicates the node that is receiving the outbound shipment.
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment's status audits.
Has Hazardous Items	Indicates if the outbound shipment contains hazardous items.

Table 242. Shipment Activity Demand, Activity Demand List

Actions	Description
Delete	This action allows you to delete the selected activity demands.
Shipment Line #	The outbound shipment line number.
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.
Item ID	The items that belong to the work order.
Priority	Indicates the priority of the demand.
Demand Quantity	Indicates whether the demand is satisfied or not.
Satisfied Quantity	The extent to which the demand is satisfied.
Demand Satisfied	Indicates whether the demand is satisfied or not.

Shipment Audits

You can view any modifications performed by the user through the Application Console against an outbound shipment in this screen.

Table 243. Shipment Audits, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.
Plan #	The delivery plan number with which the outbound shipment is associated, if applicable. Click this link to go to the Select Delivery Plan screen where you can add an outbound shipment to a delivery plan.

Table 243. Shipment Audits, Shipment (continued)

Fields	Description
Enterprise	The Enterprise associated with the shipment.
Buyer	The identifier for the Buyer. Click this link to go to the Organization Details screen where you can view the buyer organization details.
Seller	The identifier for the Seller. 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 outbound shipment ships. Click this link to go to the Ship Node Detail screen where you can view the node details for the shipment.
Receiving Node	The node that is receiving the outbound shipment.
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment's status audits.
Has Hazardous Item	Indicates if the shipment has any hazardous item.

Table 244. Shipment Audits, Shipment Audits

Fields	Description
Date	The date and time on which the shipment was modified.
Modified By	The user who performed the modification.
Context	The modifications carried out against the shipment.
Modification	The attribute that was modified for the shipment.
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.

Table 245. Shipment, Shipment Line Audits

Fields	Description
Date	The date and time on which the shipment line was modified.
Modified By	The user who performed the modification.
Context	The modifications carried out against the shipment line.
Line #	The shipment line number that was modified.
Modification	The attribute that was modified for the 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.

Logical Kits

You can view the kit components for a logical kit in this screen.

Table 246. Shipment Line Details, Shipment Line

Fields	Description
Shipment Line #	The shipment line number.
Shipment #	The outbound shipment number.
Enterprise	The Enterprise associated with the shipment.
Order #	The order number to which the outbound shipment line belongs.
Order Line #	The order line number to which the outbound shipment line belongs.
Release #	The order release number to which the outbound shipment line belongs.
Item ID	The outbound shipment line item's item ID.
Description	The item's description.
Is Hazardous Item	Displays 'Y' if the item is a hazardous item, or 'N' if it is not a hazardous item.
Product Class	The outbound shipment line item's product class.
Unit of Measure	The outbound shipment line item's unit of measure.
Requested Serial #	The serial number requested in the order.
Quantity	Number of requested units of the item included in the shipment.
Over Ship Quantity	Indicates quantity of an item over shipped.
Original Qty	Indicates the original quantity on the order for the item.

Table 247. Shipment Line Details, Line Attributes

Fields	Description
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.
COO	The country or region of origin.
FIFO #	FIFO number is a date based inventory attribute that helps understand the order in which stock arrived at the node. This is used to send out items that arrived first than the ones that arrived later.
Net Weight	The net weight.
Net Weight UOM	The net weight unit of measure.
Wave #	The wave number.
Customer PO #	The customer's purchase order number.

Table 248. Shipment Line Details, Kit Components

Actions	Description
View Details	This action takes you to the Shipment Line Details screen where you can view the shipment line details.
Fields	
Item ID	The item ID for the SKU.
Description	Description of the item.
PC	Indicates the item's inventory categorization. Orders are placed for an item and product class. Typical examples are IRREGULAR, FD (Factory Defects).
UOM	The item's unit of measure.
Qty Per Kit	Number of units of the item included in the kit.
Wave #	The wave number associated with the shipment line.
Quantity	Number of units of the item included in the shipment.

Pack Containers

(Applicable only for IBM Sterling Distributed Order Management, IBM Sterling Supply Collaboration, and IBM Sterling Reverse Logistics)

You can pack any unpacked items into containers for shipping in this screen.

Table 249. Pack Container, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.
Plan #	The delivery plan number the outbound shipment is associated with, if applicable. Click this link to go to the Select Delivery Plan screen where you can add an outbound shipment to a delivery plan.
Enterprise	The Enterprise associated with the shipment.
Buyer	The identifier for the Buyer. Click this link to go to the Organization Details screen where you can view the buyer organization details.
Seller	The identifier for the Seller. 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 outbound shipment ships. Click this link to go to the Ship Node Detail screen where you can view the node details for the shipment.
Destination	The outbound shipment's destination.
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment's status audits.

Table 250. Pack Container, Ship To

Description
The address the shipment is shipped to. Click the **Address Details** icon to go to the Address Details screen where you can modify the ship to address.

Table 251. Pack Container, Container Details

Fields	Description
Container Type	Select whether the container is a case or pallet.
Container SCM	Enter the shipment container marking number of the case or pallet.
Tracking #	Enter the container's tracking number used to track the container's status and location.
Declared Value	Enter the declared value used to calculate customs charges. This field is only applicable to international shipments.
Gross Weight	Enter the weight of the container plus its contents.
Net Weight	Enter the net weight of the container.
Height	Enter the height of the container.
Width	Enter the width of the container.
Length	Enter the length of the container.

Table 252. Pack Container, Unpacked Items

Fields	Description
Tag/Serial	This column displays only if the item is tag-controlled or serial tracked. 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 container line, click the hypertext link. The tag details for a tag-controlled item displays, if the ship node is configured to capture tags in all operations performed within the node, or if the buyer on a shipment mandates it as a part of their inbound compliance. For more information about capturing tag attributes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Order #	The order number associated with the unpacked items.
Line #	The order line number to which the line item packaged in the container belongs to.
Release #	The order release number to which the unpacked line item belongs.
Item ID	The item ID of the unpacked line item.
PC	The product class of the unpacked line item.
UOM	The unit of measure of the unpacked line item.
Quantity	The quantity associated with the unpacked items.
Pack Quantity	Enter the item quantity you can pack in the container.

If the item is serial-controlled, an additional field is displayed to let you enter the serial number.

Table 253. Pack Container, Serial Range

Field	Description
Serial #	Enter the serial number of the item. Click the **Add** icon to add a new serial number. Click the **Toggle** icon to go to the serial range panel, where you can enter the serial range of the items.
From Serial #	Enter the start serial number.
To Serial #	Enter the end serial number. Click the **Add** icon to add a new serial range.

While packing whenever there is requested serial defined in shipment lines of the outbound shipment, the 'Enter serial range' button is not displayed in the screen.

For a serial tracked or serialized item, if secondary serials are defined and secondary information is not provided, then in such scenario the 'Entry Serial Range' button is not provided in the screen.

Packing a Container

You can pack any unpacked items into containers for shipping in this screen.

Print

You can print documents or labels and apply to an outbound shipment with the help of this screen.

Table 254. Print

Fields	Description
Print Service Name	Choose the applicable document or label you want to print.
Printer Name	Choose the printer to print the document or label from.
No. of Copies	Enter the total number of copies of the document or label to print.

Cancel Selected Shipments

This screen allows you to cancel the selected outbound shipments.

Table 255. Cancel Selected Shipments

Fields	Description
Backorder cancelled quantity	Select if the quantity that was cancelled from a shipment must be backordered.
Cancellation Reason Code	Select the applicable reason code for cancellation.
Reason Text	Enter reason for cancellation of the outbound shipment.

Split Shipment

Use this screen to split an outbound shipment.

Table 256. Split Shipment, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.
Plan #	The delivery plan number the outbound shipment is associated with, if applicable. Click this link to go to the Select Delivery Plan screen where you can add an outbound shipment to a delivery plan.
Enterprise	The Enterprise associated with the shipment.
Buyer	The identifier for the Buyer. Click this link to go to the Organization Details screen where you can view the buyer organization details.
Seller	The identifier for the Seller. 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 outbound shipment ships. Click this link to go to the Ship Node Detail screen where you can view the node details for the shipment.
Destination	The outbound shipment's destination.
Status	The outbound shipment status. Click this link to go to the Shipment Status Audits screen where you can view the shipment's status audits.

Table 257. Split Shipment, Shipment Lines

Actions	Description
Split Lines	This action takes you to the Split Shipment Lines where you can split the selected shipment line or container lines.
Fields	
Shipment Line #	The line number on the shipment for the item.
Order #	The order number to which the shipment line belongs
Line #	The line number to which the shipment line belongs.
Release #	The order release number to which the shipment line belongs.
Item ID	The item ID for the SKU.
Description	The item's description.
PC	Indicates the item's inventory categorization. Orders are placed for an item and product class. Typical examples are IRREGULAR, FD (Factory Defects).
UOM	The item's unit of measure.
Mark For	The net weight of item expected
Quantity	Number of units of the item included in the shipment.
Split Qty	Enter the number of units of the item to be split.

Table 258. Split Shipment, Shipment Containers

Actions	Description
Split Containers	This action takes you to the Split Shipment Lines where you can split the selected shipment line or container lines.
Fields	
Container #	The container number.
Tracking #	The tracking number used to track a container during the shipment process.
Container SCM	The shipment container marking.
Net Weight	The container's net weight.
Gross Weight	The container's total weight (including packaging).
Freight Charge	The charge applied by the Carrier for shipping the container.

Split Shipment Lines

Use this screen to split a shipment or container lines in this screen.

Table 259. Split Shipment, Shipment

Fields	Description
Shipment #	The shipment number associated with the outbound shipment is automatically generated and populated by the system. Enter the outbound shipment number, if applicable.

Create Alerts

You can create alerts for the selected outbound shipments in this screen. For field value descriptions, see the Shipment Alerts, Shipment and Shipment Alerts, Alert List tables.

Ship Node Detail

You can view the ship node details for an inbound shipment in this screen.

Table 260. Ship Node Details, Ship Node

Fields	Description
Ship Node	The node from where the outbound shipment ships.
Description	A brief description of the ship node.
Interface	The interface the node uses to communicate with the system.
Parent Organization	The organization that owns the ship node.
Parent Organization Name	The name of the parent organization.
Identified By Parent As	The node ID as it is seen by the parent organization.
GLN	The GLN number.

Table 261. Ship Node Detail, Ship Node Address

Description
The ship node's address.

Table 262. Ship Node Detail, Contact Address

Description
The contact address for the ship node.

Organization Details

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

Table 263. 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. Sterling 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 the **Address Details** icon to view the Primary Contact Address Details. For more information about the Primary Contact Address Details window, see Address Details.	
Corporate Address	
This inner panel displays the current corporate address for this organization. Click the **Address Details** icon to view the Corporate Address Details. For more information about the Corporate Address Details window, see Address Details.	

Select Delivery Plan

You can add an outbound shipment to a delivery plan in this screen.

Table 264. Select Delivery Plan

Fields	Description
Plan #	Enter the plan number of the delivery plan you want to add the outbound shipment to.
Plan Name	Enter the name of the delivery plan you want to add the outbound shipment to.
Plan Date	Enter the date range through which the delivery plan you are adding the outbound shipment to is valid.

Shipment Line Details

You can view an outbound shipment line details in this screen.

Table 265. Shipment Line Details, Shipment Line

Fields	**Description**
Shipment Line #	The shipment line number.
Shipment #	The outbound shipment number.
Enterprise	The Enterprise associated with the shipment.
Order #	The order number to which the outbound shipment line belongs.
Order Line #	The order line number to which the outbound shipment line belongs.
Release #	The order release number to which the outbound shipment line belongs.
Item ID	The outbound shipment line item's item ID.
Description	The item's description.
Is Hazardous Item	Displays 'Y' if the item is a hazardous item, or 'N' if it is not a hazardous item.
Product Class	The outbound shipment line item's product class.
Unit of Measure	The outbound shipment line item's unit of measure.
Requested Serial #	The serial number requested in the order.
Quantity	Number of requested units of the item included in the shipment.
Over Ship Quantity	Indicates quantity of an item over shipped.
Original Qty	Indicates the original quantity on the order for the item.

Table 266. Shipment Line Details, Line Attributes

Fields	**Description**
Segment Type	The item's segment type. A segment type indicates an inventory category. Typical values are MTC - Made To Customer or MTO - Made to Order.
Segment	The item's segment number. A segment holds either the specific buyer or specific order number that requires dedication.
COO	The country or region of origin.
FIFO #	The FIFO number is a date based inventory attribute that helps understand the order in which stock arrived at the node. This is used to send out items that arrived first than the ones that arrived later.
Net Weight	The net weight.
Net Weight UOM	The net weight unit of measure.
Wave #	The wave number.
Customer PO #	The customer's purchase order number.

Table 267. Shipment Line Details, Requested Tag

Fields	Description
Tag Identifiers	The requested tag identifiers for this shipment line.
Tag Attributes	The requested tag attributes for this shipment line.

Table 268. Shipment Line Details, Actual Tag

Actions	Description
Delete	This action deletes the specified tag quantity from the shipment line.
Fields	
The attributes shown here depend on the tag identifiers and attributes configured.	
Quantity	Indicates the quantity on the order with this tag criteria.

Add Release

You can add an order release line to be included in an outbound shipment in this screen.

Create Wave

You can create wave for the selected shipment group in this screen.

Table 269. Create Wave

Fields	Description
Node	Node associated with the wave.
Create New Wave With Shipment Group	Select the shipment group for the wave.
Add To Wave #	Choose this option to add shipment to an existing wave number. You can also click the **Lookup** icon to select a wave number.
Consider	Select one of the following options: All Eligible Shipments - Choose this to select all the shipments. First Shipments based on Expected Ship Date - Choose this to select the first shipments based on the expected ship date.

Containers

A container is the physical packaging of outbound shipment line items included in a shipment. Cartons and pallets are examples of containers. You can use the Outbound Shipment Console to search for individual containers and view details such as container dimensions and line items packed in the container.

Container Search By All Attributes

You can search for containers by all attributes with the help of this screen.

Table 270. Container Search By All Attributes

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable
Order #	Enter the order number you are searching for, if applicable.
Shipment #	Enter the outbound shipment number you are searching for, if applicable.
Container #	Enter the container number you are searching for, if applicable.
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 number you are searching for, if applicable.
Has Hazardous Items	Select this check box to search for containers containing hazardous items, if applicable.
Containers With Logical Kits Only	Select this if you want to search for containers only with logical kits, if applicable.
Max Records	Enter the maximum number of outbound shipments you want returned from your search.

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

The Container List screen displays as a result of outbound container search by all attributes.

Container Search By Status

You can search for containers that fall within a particular status with the help of this screen.

Table 271. Container Search By Status

Fields	Description
Document Type	Select the appropriate document type to search for, if applicable.
Node	Select the node for which you want to search.
Shipment #	Enter the outbound shipment number you are searching for, if applicable.
Container #	Enter the container number you are searching for, if applicable.

Table 271. Container Search By Status (continued)

Fields	Description
Container Type	Enter the type of containers you are searching for, if applicable.
Container Contains	Select the container quantity you are searching for, if applicable.
Status	Select the status range of the container you want to search for, if applicable.
Carrier/Service	Select the carrier/service you are searching for, if applicable.
Container Group	Select the container group you are searching for, if applicable.
Wave #	Enter the wave number you are searching for, if applicable.
Outermost Containers Only	Select check box to search for outermost containers only, if applicable.
Unmanifested Containers Only	Select check box to search for unmanifested containers only, if applicable.
Max Records	Enter the maximum number of outbound shipments you want returned from your search.

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

The Container List screen displays as a result of outbound container search by status.

Container List

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

Table 272. Container List

Actions	Description
View Details	This action takes you to the Container Details screen where you can view the container details.
Pack/Unpack	This action takes you to the Pack or Unpack screen where you can pack or unpack a container.
Print	This action takes you to the Print screen where you can print the container's documents or labels.
Delete	This action lets you delete an inbound container.
Void Tracking#	This action lets you void a container's tracking number.
Fields	
Container #	The container number.
Shipment #	The shipment number of the shipment the container belongs to.
Status	The container status.
Manifested	Indicates whether the container is manifested.
Container Type	Indicates whether it is a Pallet or Carton.

Table 272. Container List (continued)

Actions	Description
Tracking #	The tracking number used to track a container during the shipment process.
Container SCM	The shipment container marking.
Ship Date	The date the container ships on.

Container Details

The Container Details screen provides container information associated with the shipment. The actions that can be performed in the Container Details screen are explained in the following tables.

Table 273. Container Details, Container

View Icon	Description
Audit	This icon takes you to the Container Status Audits where you can view the container's status audits.
Activity Demand	This icon takes you to the Container Activity List where you can view activities performed against an outbound container.
Actions	
Pack/Unpack	This action takes you to the Pack or Unpack screen where you can pack or unpack a container.
Print	This action takes you to the Print screen where you can print the shipping documents or labels.
Void Tracking #	This action takes lets you void a container's tracking number.
View Return Tracking Numbers	This action takes you to the Container Return Tracking Numbers screen where you can view the list of return tracking numbers associated to a container.
Fields	
Container #	The container number.
Container Type	The type of container used. For example, Carton or Pallet.
Container Group	The container group to which the container belongs to. Valid values are: SHIPMENT, LOAD, or INVENTORY.
Parent Container #	The parent container #. This field displays only if the container is a child container.
Parent Container Type #	The type of parent container used. For example, Carton or Pallet. This field displays only if the container is a child container.
Parent Container Group #	The container group to which the container belongs to. Valid values are: SHIPMENT, LOAD, or INVENTORY. This field displays only if the container is a child container.
Container SCM	The shipment container marking number of the case or pallet.

Table 273. Container Details, Container (continued)

View Icon	Description
Shipment #	The outbound shipment number.
Load #	The load number associated with the container. This field displays only if the container belongs to a load. Click this link to go to the Load Details screen to view the load details associated with the container.

Table 274. Container Details, Execution Details

Fields	Description
Container Location	Indicates the location where the container is available.
Container Status	Indicates the current status of the container.
Is Manifested	Indicates whether the container is manifested.

Table 275. Container Details, Container Info

Fields	Description
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.
Gross Weight	The weight of the container plus its contents.
COD Pay Method	The COD payment type.
Return Tracking #	The return tracking number associated with the container.
Net Weight	The container's content's weight.
COD Amount	The COD amount.
Size	The size of the container.
Actual Weight	The actual weight of the container.
Actual Freight Charge	The actual freight charges for the carrier or service
Length	The length of the container.
Billed Weight	The billed weight.
Special Services Surcharges	The special services surcharges.
Width	The width of the container.
Has Hazardous Items	Indicates if the container contains hazardous items.
Declared Insurance Value	The value used to calculate customs charges. This field is only applicable to international shipments.
Height	The height of the container.

Table 276. Container Details, Container Line Details

Fields	Description
Tag Details	This column displays only if the item is tag-controlled or serial tracked. 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 #. The tag details for a tag-controlled item displays, if the ship node is configured to capture tags in all operations performed within the node, or if the buyer on a shipment mandates it as a part of their inbound compliance. For more information about capturing tag attributes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*. Click this link to go to the "Container Return Tracking Numbers" on page 189 screen to the serial details for the container line.
Order #	The order number to which the line item packaged in the container belongs.
Line #	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.
Description	The item's description.
Quantity	The quantity of the line item to be packaged into the container.
Packed Quantity	The actual quantity of the line item packaged into the container.

Table 277. Container Details, Inner Pack Details

Fields	
Tag Details	Click the **Plus** icon to view and hide tag information of an inner pack. The tag details for a tag-controlled item displays, if the ship node is configured to capture tags in all operations performed within the node, or if the buyer on a shipment mandates it as a part of their inbound compliance. For more information about capturing tag attributes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
Item ID	The item's item ID.
PC	The item's product class.
UOM	The item's unit of measure.
Description	A brief description of the item.
Inner Pack Quantity	The item quantity contained in each inner pack.
No Of Inner Packs	The total number of inner packs packaged into the container.

Table 278. Container Details, Child Containers

Fields	Description
Container #	The container number.
Status	The container status.
Container Type	The type of container used. For example, Carton or Pallet.
Tracking #	The container's tracking number used to track the status and location of the container.
Container SCM	The shipment container marking.

Container Return Tracking Numbers

You can view the outbound container return tracking nu

Table 279. Container Return Tracking Numbers, Container

Fields	Description
Container #	The container number.
Container Type	The type of container used. For example, Carton or Pallet.
Container Group	The container group to which the container belongs to. Valid values are: SHIPMENT, LOAD, or INVENTORY.
Container SCM	The shipment container marking number of the case or pallet.
Shipment #	The outbound shipment number.

Table 280. Container Return Tracking Numbers, Container Return Tracking Numbers

Actions	Description
Print	This action takes you to the Print screen where you can print the return labels corresponding to the return tracking numbers. You must select the Return Tracking Number and click Print. If you select the ReprintCarrierLabel service, the return label will be reprinted. **Note:** You must select the Return Tracking Numbers one at a time.
Fields	
Return Tracking Number	Displays the outbound container return tracking numbers.

Serial Details

You can view an outbound container serial details in this screen.

Table 281. Serial Details, Serial Information

Fields	Description
Node	Node associated with the item.
Location	Location associated with the item.
Case ID	Case LPN associated with the container.
Pallet ID	Pallet LPN associated with the container.

Table 281. Serial Details, Serial Information (continued)

Fields	Description
Serial #	The serial number associated with the container items.

Table 282. Serial Details, Child Serials

Fields	Description
Secondary Serial #1	Component serial number of the item.
Secondary Serial #2	Component serial number of the item.
Secondary Serial #3	Component serial number of the item.
Secondary Serial #4	Component serial number of the item.
Secondary Serial #5	Component serial number of the item.
Secondary Serial #6	Component serial number of the item.
Secondary Serial #7	Component serial number of the item.
Secondary Serial #8	Component serial number of the item.
Secondary Serial #9	Component serial number of the item.

Container Status Audits

You can view any status modifications performed against an outbound container status in this screen.

Table 283. Container Status Audits, Container

Fields	Description
Container #	The outbound container number.
Container Type	The outbound container type. Valid values are: Pallet or Case.
Container Group	The container group to which the container belongs to. Valid values are: SHIPMENT, LOAD, or INVENTORY.
Parent Container #	The parent container number. This field displays only if the container is a child container.
Parent Container Type	The type of parent container used. For example, Case or Pallet. This field displays only if the container is a child container.
Parent Container Group	The container group to which the container belongs. Valid values are: SHIPMENT, LOAD, or INVENTORY. This field displays only if the container is a child container.
Container SCM	The shipment container marking number of the case or pallet.
Shipment #	The outbound shipment number. Click this link to go to the Shipment Details screen and view the outbound shipment details.

Table 284. Container Status Audits, Container Status Audits

Fields	Description
Modified By	The user who performed the modification.

Table 284. Container Status Audits, Container Status Audits (continued)

Fields	Description
Old Status	The outbound shipment status before the status modification.
Old Status Date	The date the outbound shipment entered the old status.
New Status	The outbound shipment status after the status modification.
New Status Date	The date the status modification was made.
Reason Code	The reason for the modification.
Reason Text	Additional information as to why the modification was made.

Container Activity List

You can view details about the outbound container activities in this screen.

Table 285. Container Activity List, Container

Fields	Description
Container #	The outbound container number.
Container Type	The outbound container type. Valid values are: Pallet or Case.
Container Group	The group to which the container belongs. Valid values are: SHIPMENT, LOAD, or INVENTORY.
Parent Container #	The parent container number. This field displays only if the container is a child container.
Parent Container Type	The type of parent container used. For example, Case or Pallet. This field displays only if the container is a child container.
Parent Container Group	The group to which the parent container belongs. Valid values are: SHIPMENT, LOAD, or INVENTORY. This field displays only if the container is a child container.
Container SCM	The shipment container marking number of the case or pallet.
Shipment #	The outbound shipment number identifying the shipment to which this container belongs. Click this link to go to the Shipment Details screen and view the details about this outbound shipment.

Table 286. Container Activity List, Container Activities

Fields	Description
Date	The date and time when the activity was performed for this container.
Recorded By	The user who performed the activity.
Activity Code	Identifies the activity that was performed.
Location ID	Indicates the location where the activity was performed in the node.
Node	Indicates the node where the activity was performed.
Address	Indicates the address where the activity was performed.

Table 286. Container Activity List, Container Activities (continued)

Fields	Description
Is An Exception	Indicates if the activity recorded is an exception to typically performed activities.
Notes	Any additional information about the activity execution.

Pack or Unpack

You can pack or unpack a container in this screen.

Delete Selected Containers

You can delete selected container from the shipment in this screen.

Table 287. Delete Selected Containers, Delete

Fields	Description
Remove quantity from shipment line	Select the check box to remove the quantity from shipment line.
Backorder removed quantity	Select the check box to remove backorder quantity.

Modify Containerization

You can modify the containerized quantity in this screen.

Table 288. Modify Containerization, Container

View Icon	Description
Audit	This icon takes you to the Container Status Audits screen where you can view a list of status audits that you modified for an outbound container.
Fields	
Container #	The container number.
Shipment #	The outbound shipment the container belongs to.
Container Type	The type of container used. For example, Carton or Pallet.
Ship Date	The date by which the container must ship.
Container Group	The container group to which the container belongs to. Valid values are: SHIPMENT, LOAD, or INVENTORY.
Manifested	Indicates whether the container is manifested.
Remove quantity from shipment line	Select check box to remove quantity from the shipment line.
Ship To	The address the container is shipped to.

Table 289. Modify Containerization, Ship To

Description
The address the shipment is shipped to. Click the **Address Details** icon to go to the Address Details screen where you can modify the ship to address.

Table 290. Modify Containerization, Container Info

Fields	Description
Carrier/Service	The Carrier and Carrier service used to ship 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 as it is insured.
Gross Weight	The gross weight of the container.
Actual Weight	The actual weight of the container.
Size	The size of the container.
Length	The length of the container.
Width	The width of the container.
Height	The height of the container.
Net Weight	The net weight of the container.

Table 291. Modify Containerization, Container Line Details

Fields	Description
Tag Details	This column displays only if the item is tag-controlled or serial tracked. 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 container line, click the hypertext link. The tag details for a tag-controlled item displays, if the ship node is configured to capture tags in all operations performed within the node, or if the buyer on a shipment mandates it as a part of their inbound compliance. For more information about capturing tag attributes, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.
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.

Table 291. Modify Containerization, Container Line Details (continued)

Fields	Description
Description	Description of the item.
Ship By Date	The date by which the container line must be shipped.
Containerized Quantity	Enter or modify the containerized quantity. If containers are short picked, you can resolve short pick by modifying the containerized quantity. For more information, see the Resolve Short Picked Containers screen.
Packed Quantity	The quantity of the line item packaged in the container.

Table 292. Modify Containerization, Execution Details

Fields	Description
Location	The outbound container present in location.
Status	The outbound container execution status.

Table 293. Modify Containerization, Child Containers

Fields	Description
Container #	The container number.
Status	The container status.
Container Type	The type of container used. For example, Carton or Pallet.
Tracking #	The container's tracking number used to track the status and location of the container.
Container SCM	The shipment container marking.

The Modify Container action is only available when that container belongs to a Sterling Warehouse Management System Node.

Resolve Short Picked Containers

About this task

Short picked containers can be resolved manually by requesting the system to pack additional inventory into the containers or modifying the containerization quantity on the container and backordering due to inadequate inventory.

Procedure

1. Click `Short Picked` link in the Container Details screen.
2. Modify the `Containerized Quantity`.
3. Click `Save`. The status changes to Short Pick Resolved.

Dock Appointment Search By All Attributes

Use this screen to search for appointment by all attributes.

Table 294. Dock Appointment Search By All Attributes

Fields	Description
Node	The node associated with the dock is displayed.

Table 294. Dock Appointment Search By All Attributes (continued)

Fields	Description
Enterprise	Select the enterprise for which you are searching for a dock appointment, if applicable.
Across Enterprises	Select this if you are searching for a dock appointment across all enterprises, if applicable.
Start Date	The start date is defaulted to the current date. Enter the start date of the appointment you are searching for, if applicable. Choose the calendar lookup to change the date.
Number of Days To Display	Enter the maximum number of days to be displayed on the dock schedule calendar as a result of your search, if applicable.
Location	Enter the dock location, if applicable. Choose the lookup option to search for dock locations.
Inbound Delivery	Select this checkbox to search for an inbound dock, if applicable.
Outbound Pickup	Select this checkbox to search for an outbound dock, if applicable.
Appointment #	Enter the appointment number you are searching for, if applicable.
Shipment #	Enter the shipment number you are searching for, if applicable.
Order #	Enter the order number you are searching for, if applicable.
Load #	Enter the load number you are searching for, if applicable.
Carrier/Service	Select the carrier or service you want to search for shipments, if applicable.
BOL #	Enter the bill of lading number you are searching for, if applicable.

The Dock Schedule Details screen is displayed as a result of dock appointment search by all attributes.

Dock Schedule Details

This screen provides visibility to the dock appointment calendar, and displays inbound, outbound, and both inbound and outbound docks with their:

- Available time slots for creating new appointments.
- Unavailable time slots due to calendar constraints.
- Unavailable time slots due to appointments already taken.

Table 295. Dock Schedule Details, Dock Availability

Actions	Description
Manage Dock Group	This action button takes you to the Dock Group Details screen.
Zoom In	Click this action button to view more definitive details of the appointment calendar. Two levels of Zoom In are supported.

Table 295. Dock Schedule Details, Dock Availability (continued)

Actions	Description
Zoom Out	Click this action button to view a larger area of the appointment calendar. Two levels of Zoom Out are supported.
Displays the dock locations for nodes that are of the dock type INBOUND, OUTBOUND, and BOTH.	

Table 296. Dock Schedule Details, Legend

Color	Description
Blue	Indicates an appointment for the searched criteria. Click a slot to modify an existing appointment. The Dock Appointment screen displays.
Cyan	Indicates appointments that do not match the searched criteria. Click a slot to modify an existing appointment. The Dock Appointment screen displays.
Gray	Indicates free slots for which new appointments can be taken. Click a slot to create a new dock appointment. The Dock Appointment screen displays.
Black	Indicates the unavailable slots due to the calendar constraints.

Dock Appointment

You can create new appointments or modify existing appointments with the help of this screen.

Table 297. Dock Appointment, Appointment Details

Actions	Description
Cancel	Click this action button to cancel an appointment.
Fields	
Appointment #	The appointment number associated with the dock displays, if applicable. The appointment number displays only for the existing appointments.
Location	The dock location for which you chose to take an appointment displays here.
Appointment Type	By default, the Outbound Pickup appointment type is selected for outbound dock locations, and Inbound Delivery for inbound and both inbound and outbound dock locations.
Start Date	This start date is defaulted with the date of the selected slot. Enter the start date on which you want to take an appointment or choose the calendar lookup to change the date.

Table 297. Dock Appointment, Appointment Details (continued)

Actions	Description
Start Time	This start time is defaulted with the time of the selected slot. Enter the start time of the appointment or choose the time lookup to change the time.
Shipment #	Enter the shipment number you want to associate with the dock appointment, if applicable. Choose the **Lookup** icon to search for shipments. The shipment's weight, volume, number of cases and number of pallets automatically displays.
Load #	Enter the load number you want to associate with the dock appointment, if applicable. Choose the **Lookup** icon to search for loads. The number of cases and number of pallets associated with the load automatically displays.
Order #	Enter the order number you want to associate with the dock appointment, if applicable.
BOL #	Enter the bill of lading number you want to associate with the dock appointment, if applicable.
PRO #	Enter the PRO number you want to associate with the dock appointment, if applicable.
Carrier	Select the carrier for which you want to take an appointment, if applicable.
Notes	Enter any additional information associated with the dock appointment, if applicable.
Weight	Enter the weight of the shipment, if applicable.
Volume	Enter the volume of the shipment, if applicable.
No Of Cases	Enter the number of cases contained in the shipment or load, if applicable.
No Of Pallets	Enter the number of pallets contained in the shipment or load, if applicable.
Estimate End Time	Click this button to calculate and display the estimated end time in the End Time field. The estimated end time is calculated based on SAM definition for the productivity type, LOADING/UNLOADING
End Time	To specify a pre-determined end time, enter the end time. Choose the time lookup to change the time.

Click Save to save the dock appointment.

Dock Group Details

You can enter constraints on the maximum number of appointments that can be taken for the group of docks associated with a node.

Table 298. Dock Group Details, Dock Group

Field	Description
Node	The node associated with the docks displays.

Table 299. Dock Group Details, Dock Group Max No. of Appointments

Action	Description
Remove	Click this action button to remove the selected appointment constraints.
Fields	
Start Time	Indicates the start time of the time slot for which the maximum number of appointment constraint needs to be created. Click the **Add** icon to create an appointment constraint.
End Time	Indicates the end time of the time slot for which the maximum number of appointment constraint needs to be created.
Sunday	Enter the maximum number of appointments you can take on this day in the time window across dock locations.
Monday	Enter the maximum number of appointments you can take on this day in the time window across dock locations.
Tuesday	Enter the maximum number of appointments you can take on this day in the time window across dock locations.
Wednesday	Enter the maximum number of appointments you can take on this day in the time window across dock locations.
Thursday	Enter the maximum number of appointments you can take on this day in the time window across dock locations.
Friday	Enter the maximum number of appointments you can take on this day in the time window across dock locations.
Saturday	Enter the maximum number of appointments you can take on this day in the time window.

Click Save to save the maximum number of dock group appointment constraints.

View Holds

You can view holds that are applied to the selected outbound shipments in this screen.

Table 300. View Holds, Shipment

Fields	Description
Shipment #	The outbound shipment number.
Shipper's Ref. #	The outbound shipment reference number.

Table 300. View Holds, Shipment (continued)

Fields	Description
Plan #	The delivery plan number the outbound shipment is associated with.
Enterprise	The enterprise associated with the outbound shipment.
Buyer	The identifier for the buyer.
Seller	The identifier for the seller.
Ship Node	The node from where the outbound shipment is shipped.
Receiving Node	The node that is receiving the outbound shipment.
Status	The outbound shipment status.
Release #	The shipment release number to which the outbound shipment line belongs.
Has Hazardous Items	Indicates if the outbound shipment contains hazardous items.
Merge Node	If you have shipment lines coming from multiple nodes and want to consolidate them into one load, enter a node at which you want all dependent shipment lines to be consolidated with the parent shipment line. **Note:** Merge Node is only relevant in a Deliver Together dependency.

Table 301. View Holds, Shipment Holds

Actions	Description
Add Holds	This action takes you to the Add Holds screen where you can add holds to the selected outbound shipment.
Fields	
Hold Description	A brief description of the hold. Choose the **View History** icon to View History of the shipments that are held.
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 302. View Holds, Resolved Holds

Fields	Description
Hold Description	A brief description of the hold.
Reason	The reason for changing this hold to resolved status.

Add Holds

You can add holds to the outbound shipment on this screen.

Table 303. Add Holds, Shipment Holds

Fields	Description
Hold Type	Select the hold type associated with the outbound shipment from the drop-down list.
Reason	Enter the reason for the hold.

View History

Whenever the status of a shipment hold changes, the information regarding the status change is recorded in Sterling Selling and Fulfillment Foundation. In this screen, you can view the history of a shipment hold.

Table 304. View History, Primary Information

Fields	Description
Shipment#	The outbound shipment number.
Shipper's Ref. #	The outbound shipper's reference number.
Plan #	The outbound shipment's plan number
Enterprise	The Enterprise associated with the shipment
Buyer	The Buyer's identifier.
Seller	The Seller's identifier.
Ship Node	The node from which the outbound shipment ships.
Receiving Node	The node which receives the outbound shipment
Status	The status of the outbound shipment.
Has Hazardous Items	Indicates if the shipment contains any hazardous item.
Merge Node	The node that has multiple shipment lines and is consolidated into one shipment.

Table 305. View History, Shipment Holds

Fields	
Hold Type	The hold type that is associated with the outbound shipment. • Date/Time - The date and time at which the status was changed for the selected hold type. • User ID - The ID of the user who was responsible for changing the status. • Status - The changed status for the selected hold type. • Comment - The comment added by the user who changed the status for the selected hold type. • Hold Transaction - The transaction that changed the status for the selected hold type.

Chapter 13. Service Work Order Console Screens

Service Work Order Console Screens

The Work Order Console provides details on service requests such as provided and delivery services.

Work Order Search By All Attributes

You can search for work orders by all attributes in this screen.

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 306. Work Order Search By All Attributes

Fields	Description
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.
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.

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 307. Work Order List

Actions	Description
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.
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.

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 308. Work Order Details Screen, Primary Information

View Icons	Description
Alert	This icon takes you to the Work Order Alerts screen to view the alerts associated with the work order.
Audit	This icon takes you to the Work Order Status Audits screen to view the work order status audits.

Table 308. Work Order Details Screen, Primary Information (continued)

View Icons	Description
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 **Notes Check** 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.
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.
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 309. Work Order Details Screen, Capacity Information

Fields	Description
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 310. 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 311. Work Order Details Screen, Open Appointments

Actions	Description
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.
Record Failure	This action takes you to the Record Service Failure screen to enter the service failure reasons for the appointment.

Table 311. Work Order Details Screen, Open Appointments (continued)

Actions	Description
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 312. Work Order Details Screen, Service Lines

Actions	Description
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.
Fields	
Item Related Info	The item name and the description is provided. Click this link to view service request details.
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 313. Work Order Details Screen, Products Being Delivered

Actions	Description
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.

Table 313. Work Order Details Screen, Products Being Delivered (continued)

Actions	Description
Fields	
Item Related Info	The item name and description is provided. Click this link to view service request details.
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.

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 *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

Table 314. Primary Information

Fields	Description
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.
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 315. Alerts

Actions	Description
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 *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

Table 315. Alerts (continued)

Actions	Description
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.

Work Order Status Audits

You can view any status modifications performed against a work order in the Work Order Details screen.

Table 316. Primary Information

Fields	Description
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.
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 317. Work Order Status Audits Screen, Status Audits

Fields	Description
Sequence #	The sequence number associated with the work order. Click on the **Plus** icon to view and hide sequence details. The fields that can be viewed when expanded are explained below: • Attribute -he name of the modified field. • Old Value - The old value of that field before modification. • New Value - The new value of that field after modification.

Table 317. Work Order Status Audits Screen, Status Audits (continued)

Fields	Description
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.
Reason	The reason for the modification.
Comments	Additional information as to why the modification was made.

Work Order Instructions

You can view or modify instructions for a work order in this screen.

Table 318. Instructions Window

Action	Description
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 **Instructions URL** icon.

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.

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 319. Service Tools Screen, Service Tools

Action	Description
Remove	This action removes the selected service tools from the list.
Fields	
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.

Table 319. Service Tools Screen, Service Tools (continued)

Action	Description
Comments	Any additional comment.

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 Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Table 320. Work Order Holds Screen, Work Order Holds

View Icons	Description
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 321. Work Order Holds Screen, Resolved Holds

View Icons	Description
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.

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 322. Add Holds Screen, Work Order Holds

Fields	**Description**
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.

View History

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

Table 323. Hold History Screen, Work Order Holds

Fields	**Description**
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.

Service Location

Table 324. Service Location Screen, Address

View Icons	**Description**
Address Details	**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 Questions	**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 **Additional Questions Check** icon is displayed. For more information about the screen that is displayed, see the Questions screen.

Table 324. Service Location Screen, Address (continued)

View Icons	Description
Permit Questions	**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 **Permit Questions Check** 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.
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/Region	The country or region 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.

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 325. Plan Work Order Appointment Screen, Work Order

Action	Description
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.
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 326. Plan Work Order Appointment Screen, Constraints

Action	Description
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.
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 327. Plan Work Order Appointment Screen, Override

Action	Description
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.

Table 327. Plan Work Order Appointment Screen, Override (continued)

Action	Description
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 328. 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.
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.

Table 328. Plan Service Appointment Screen, Available Slots (continued)

Fields	
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: • **Add** icon - The time slot has sufficient capacity. Select to make this the Currently Chosen Appointment Date. • **Delete** icon on a white or blue background - The time slot does not have sufficient capacity. • **Add Preferred** icon - The time slot is the preferred time slot for this customer. • **Delete** icon on a gray background - The region is not serviced for the time slot. • A gray background - The time slot is never serviced.

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.

Product Availability

The availability of the products can be viewed in this screen to make appointment changes.

Table 329. Product Availability Screen, Product Availability

Actions	**Description**
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 Selling and Fulfillment Foundation: 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.
Ship Node	The item's ship node.
Procure From Node	The item's procurement node. A **Warning Indicator** 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.

Change Nodes

Table 330. Change Nodes

Fields	Description
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 the **Lookup** icon 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 the **Lookup** icon which takes you to the node lookup screen.

Click Save to save changes.

Resource Availability

The availability of the resources can be viewed in this screen.

Table 331. Resource Availability Screen, Resource Pool

Fields	Description
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 332. Resource Availability Screen, Resource Availability

Fields	Description
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.

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 333. 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.

The list of team members gets automatically populated by Sterling 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 *IBM Sterling Global Inventory Visibility: Configuration Guide*.

Table 334. Record Completion Screen, Service Lines

Fields	**Description**
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 335. Record Completion Screen, Products Being Delivered

Fields	**Description**
Item Related Info	The item name and description is provided.
PC	The item's product class.
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.

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 336. 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.

The list of team members gets automatically populated by Sterling 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 *IBM Sterling Global Inventory Visibility: Configuration Guide*.

Click `Save` after entering the relevant information for the service failure.

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 337. Work Order Appointments Screen, Closed Appointments

Actions	Description
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

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.

You cannot view the details for the cancelled appointments.

Table 338. Record Completion Screen, Team Members

Actions	**Description**
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.

The list of team members gets automatically populated by the Sterling 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 **Add** icon. For more information about assigning team members to a resource, see the *IBM Sterling Global Inventory Visibility: Configuration Guide*.

Add Service Lines

You can add service lines to the work order details with the help of this screen.

Table 339. Add Service Lines Screen, Provided Services

Fields	**Description**
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 340. Add Service Lines Screen, Delivery Services

Fields	**Description**
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.

Add Products Being Delivered

The products being delivered is added to the work order using this screen.

Table 341. Adding Products Being Delivered Screen, Products Being Delivered

Fields	Description
Item ID	The item ID to be delivered.
PC	Product class of the item.
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.

Modify Work Order

The modify work order window appears when you make modifications to the work order details or work order appointment screens.

Table 342. 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.

Cancel Work Order

You can provide a cancellation code and reason for cancelling a work order.

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 343. 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.

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 Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

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

Chapter 14. Accept/Reject Transfer Console Screens

Accept/Reject Procurement Requests

Table 344. Accept/Reject Procurement Requests

Fields	Description
Procure From Node	This field is defaulted to the node of the user that is logged in.
Order # / Line #	The order number and line number of the procurement request that is awaiting acceptance.
Item	The requested item on the order or line.
PC	The product class of the item.
UOM	The unit of measure.
Ship Node	The ship node requesting the transfer of inventory.
Quantity	The requested quantity.
Action	Select whether to accept or reject this request.
Action Quantity	Depending on your action, select the quantity you are accepting or rejecting.

Click Save to confirm your acceptances or rejections.

Chapter 15. Serviced Area Search Screens

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. Sterling Selling and Fulfillment Foundation looks for available resources and capacity across all the resource pools for the user's enterprise.

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, Sterling 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, Sterling 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, Sterling Selling and Fulfillment Foundation returns no service availability.

Table 345. Serviced Area Search

Fields	Description
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/Region	This field is defaulted to the country or region of the user that is logged in.
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.

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 346. Serviced Area List Screen, Available Slots

Fields	Description
Slot (Start Time- End Time)	Indicates the time slots associated with this region.

Table 346. Serviced Area List Screen, Available Slots (continued)

Fields	Description
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.

Chapter 16. Route Entry Screens

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.

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 347. Work Order Appointments Search

Fields	Description
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.

Route Entry

This screen displays the list of appointments, grouped by resource pool.

Table 348. Route Entry Screen, Work Order Appointments

Actions	Description
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.

Table 348. Route Entry Screen, Work Order Appointments (continued)

Actions	Description
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.

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 349. Override Team Members Screen, Team Members

Fields	Description
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 **Add** icon to add new team members, and click `Save` once you are done.

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