

Sterling Supply Chain Applications Platform

User Guide

Release 7.9

October 2006



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Preface

Intended Audience

This manual is intended to provide assistance on how to use the Sterling Supply Chain Application Consoles interface or the tools available in the Sterling Supply Chain Applications.

Structure

This manual contains the following sections:

Chapter 1, "Getting Started"

This chapter explains the basic functionality of the Sterling Supply Chain Application Consoles.

Chapter 2, "Alert Console Screens"

This chapter explains the field level descriptions of the alert console user screens.

Chapter 3, "Sterling Rich Client Platform Alert Screens"

This chapter explains the field level descriptions of the Sterling RCP alert screens.

Chapter 4, "Exception Console Screens"

This chapter explains the field level descriptions of the exception console user screens.

Chapter 5, "Document Template Screens"

This chapter explains the field level descriptions of the template console user screens.

Chapter 6, "Lookup Screens"

This chapter explains the field level descriptions of the lookup console user screens.

Sterling Supply Chain Applications Documentation

For more information about the Sterling Supply Chain Applications Platform[®] components, see the following manuals in the Sterling Supply Chain Applications[®] documentation set:

- *Sterling Supply Chain Applications[®] Release Notes*
- *Sterling Supply Chain Applications[®] Installation Guide*
- *Sterling Supply Chain Applications[®] Upgrade Guide*
- *Sterling Supply Chain Applications[®] Performance Management Guide*
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- *Sterling Supply Chain Mobile Application® User Guide*
- *Sterling Supply Chain Analytics® Guide*
- *Sterling Supply Chain Applications® Javadocs*
- *Sterling Supply Chain Applications® Glossary*
- *Sterling Parcel Carrier Adapter® Guide*
- *Sterling Application Server® Installation Guide* (for optional component)

Conventions

The following conventions may be used in this manual:

Convention	Meaning
. . .	An ellipsis represents information that has been omitted.
< >	Angle brackets indicate user-supplied input.
mono-spaced text	Mono-spaced text indicates a file name, directory path, attribute name, or an inline code example or command.

Convention	Meaning
/ or \	Slashes and backslashes are file separators for Windows, UNIX and LINUX operating systems. The file separator for the Windows operating system is "\" and the file separator for Unix and Linux systems is "/". The Unix convention is used unless otherwise mentioned.
<YANTRA_HOME>	User-supplied location of the Sterling Supply Chain Applications installation directory.
<YFS_HOME>	Location of the generated <YANTRA_HOME>/Runtime directory.
<YANTRA_HOME_OLD>	User-supplied location of the Sterling Supply Chain Applications installation directory for previously installed releases. This is only applicable for Release 7.7 or above.
<YFS_HOME_OLD>	This is the <YANTRA_HOME_OLD>/Runtime directory of previously installed releases.

Getting Started

This chapter describes the following tasks and behaviors associated with the Sterling Supply Chain Application Consoles user interface:

- **Starting the Sterling Supply Chain Applications**
- **Adding the Sterling Supply Chain Applications as a Trusted Website**
- **The Sterling Supply Chain Application Consoles Layout**
- **Login Permissions**
- **Customizations Available Throughout the Sterling Supply Chain Applications**
- **User Permissions and Data Security**
- **Troubleshooting Error Messages**
- **Using Special Characters**

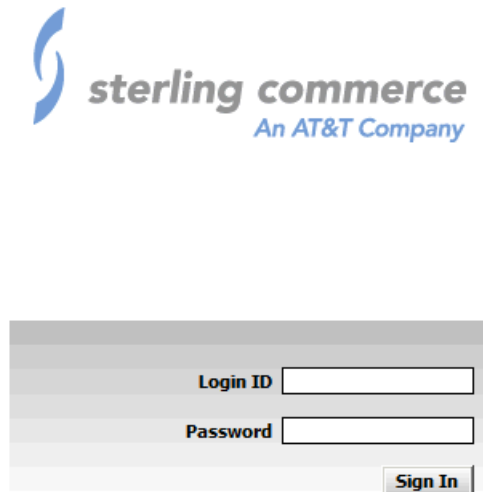
1.1 Starting the Sterling Supply Chain Applications

To access the Sterling Supply Chain Applications, point your browser to:

`http://<Server where Sterling Supply Chain Applications is installed>/yantra/console/start.jsp`

The browser now displays the Sign In window.

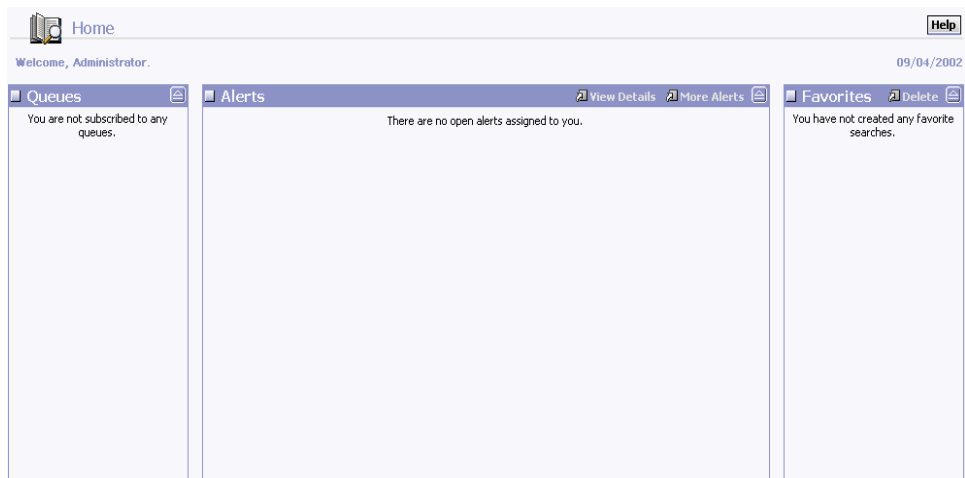
Figure 1–1 Sign In Window



The image shows the Sterling Commerce logo at the top, which consists of a blue stylized 'S' followed by the text 'sterling commerce' and 'An AT&T Company' below it. Below the logo is a sign-in form with a light gray background. The form contains two input fields: 'Login ID' and 'Password'. Below these fields is a 'Sign In' button.

To sign in to the Sterling Supply Chain Application Consoles, enter your Login ID and Password and click Sign In. The Home page displays.

Figure 1–2 Home Page

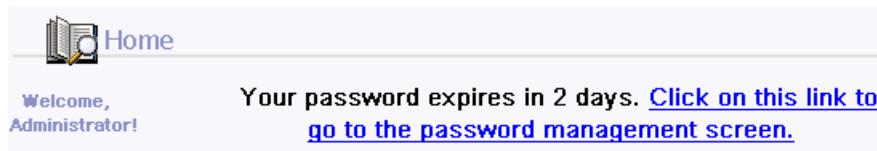


The image shows the Sterling Commerce Home page. At the top, there is a 'Home' link with a folder icon and a 'Help' button. Below this, a welcome message 'Welcome, Administrator.' is displayed on the left, and the date '09/04/2002' is on the right. The main content area is divided into three panels: 'Queues', 'Alerts', and 'Favorites'. The 'Queues' panel shows 'You are not subscribed to any queues.' The 'Alerts' panel shows 'There are no open alerts assigned to you.' and includes links for 'View Details' and 'More Alerts'. The 'Favorites' panel shows 'You have not created any favorite searches.' and includes a 'Delete' link.

The Home page displays your assigned queues and the number of alerts assigned to that queue, as well as the number of alerts in that queue

that are assigned to you, any alerts assigned to you (see [Chapter 2, "Alert Console Screens"](#)), and any saved searches (see [Section 1.3.1, "Search Window"](#) on page 4) you may have.

If you have enabled password expiration through an LDAP server, you see a welcome message informing you of the number of days until your password expires and a link to change the password in the home page. This link takes you to the URL specified in your server authentication. For more information on LDAP authentication, see the *Sterling Supply Chain Applications Installation Guide*.



1.2 Adding the Sterling Supply Chain Applications as a Trusted Website

You should set the Sterling Supply Chain Applications to be recognized as a trusted web site. Not doing so could cause certain pop-up windows such as date and time selection to display a status bar, thereby hiding certain action buttons.

To add the Sterling Supply Chain Applications to the list of trusted websites:

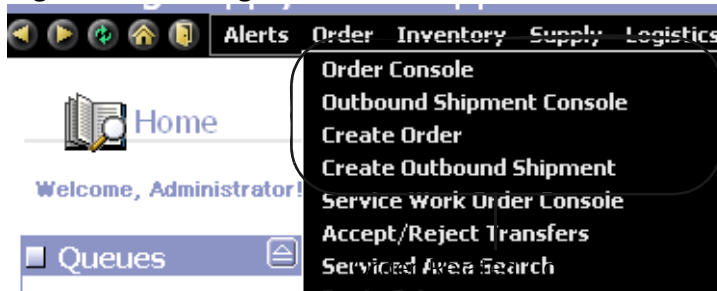
1. In the Internet Explorer menu bar, select Tools > Internet Options. The Internet Options pop-up window is displayed.
2. In the Internet Options pop-up window, Select the Security tab.
3. Click the Trusted sites icon.
4. Click the Sites action button. The Trusted sites pop-up window is displayed.
5. In the 'Add this Web site to the zone' text box, enter the server address where the Sterling Supply Chain Application Consoles are installed. The port number does not need to be specified.
6. Uncheck the 'Require server verification (https:) for all sites in this zone' checkbox.

7. Click OK. This will take you back to the Internet Options pop-up window.
8. Click OK.

1.3 The Sterling Supply Chain Application Consoles Layout

The Application Consoles can be selected from the navigation bar.

Figure 1–3 Navigation Bar



A typical console consists of a search window, list window, and details windows.

1.3.1 Search Window

Most consoles begin at a search window. A search window provides you with a means to locate a specific entity. You can perform a broad search or refine the search criteria to return a narrowed set of results. For example, you can perform a general search for all order lines that exist for your organization or you can perform a search for all order lines in their organization that contain a particular item.

Depending on the Console you are in you can select different entities and search views from the entity and search view drop-down lists. For example, in the Order Console, you can search for an order release (entity) that contains a particular item (search view).

Some search criteria fields let you select from a drop-down list of available criteria while others require you to enter criteria. For fields that you must enter criteria, you can enter the complete criteria, choose Is,

Starts with, or Contains and enter the applicable information, or you can leave the field blank and a general search is performed.

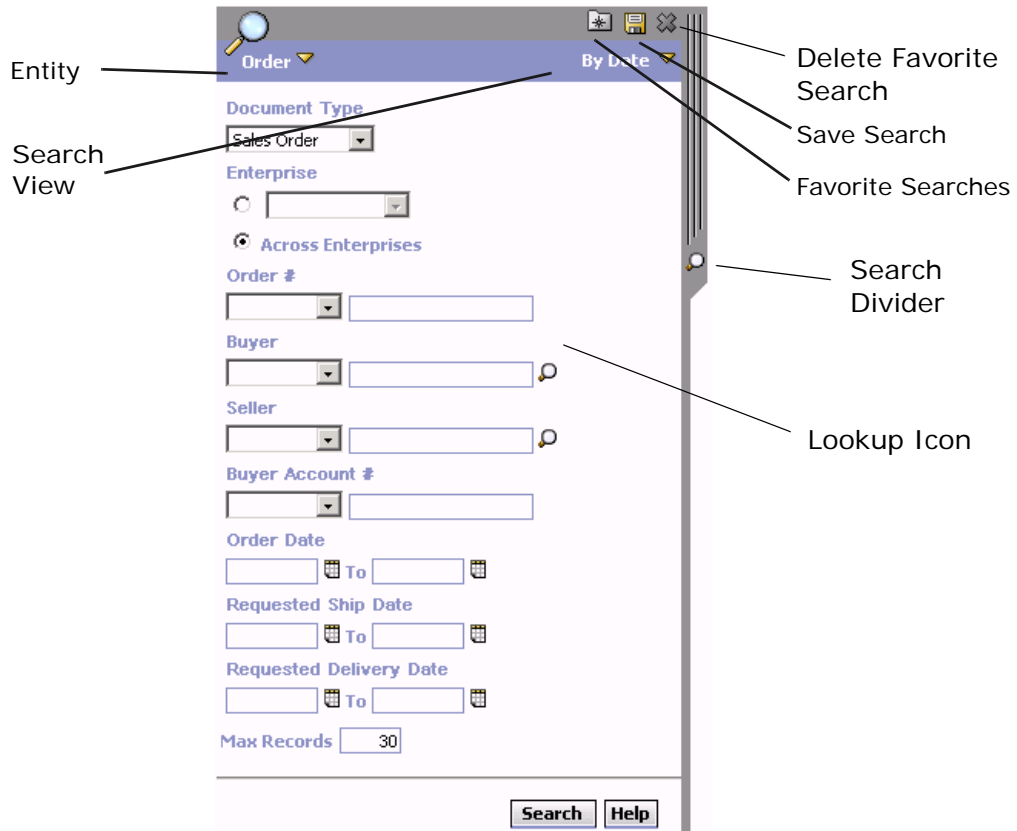
Note: When performing a search for an order document, such as a sales order or return, if you enter the specific order document number, the specific order document is displayed as opposed to the list screen. However, if you perform such a search with the History option in the Order State field selected, a list window is displayed.

Important: If you choose Contains and leave the criteria field blank, the application assumes you are searching for entities that contain a space for that criteria. If you want to perform a general search for a criteria field do not select Is, Starts With, or Contains.

For example, if you want to perform a search for all alerts in which an Owner contains a space, you would select Contains from the Owner drop-down list and leave the entry field empty.

Also note that you can use Contains and '%' to perform a wild card search. For example, Customer Contains 'Retail%'.

Figure 1–4 Search Window



If there is a particular search that you perform frequently, you can give the search a name and save it as a Favorite Search. This Favorite Search can then be accessed from both the Home page and the applicable search window.

Once you have performed the search for the applicable entity and criteria, the search window collapses to the left side of your screen and a list window appears displaying the search results.

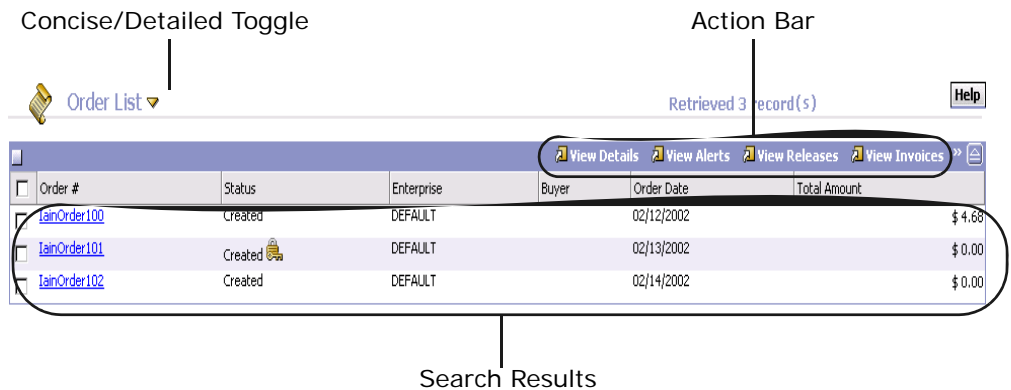
Note: The appearance of fields on search screens depends on the number of entities you can access, as described below:

- Access to one - the field displays that single specific entity. The display is protected and cannot be changed.
- Access to 2-20 - the field displays a drop down from which you can select an entity.
- Access to more than 20 - the field is protected and can only be changed by using the lookup button.

1.3.2 List Window

A list window provides you with the results of the search you performed. It also provides general information about the individual results. Some list windows provide multiple views that you can switch between. For example you can view a normal order list or a more detailed order list.

Figure 1–5 List Window



From the list window you can select the applicable entities you want to work with and perform actions on them. The actions you can perform are listed on the action bar.

If you select an entity and perform a view action on it, a details window is displayed. If you select multiple entities and perform a view action on

them, the first entity selected is displayed in the details window and the ability to switch between the multiple entities is provided.

1.3.3 Details Window

A details window provides you with detailed information regarding the entity that you have selected to view. A details window provides the ability to perform further actions on an entity as well as the ability to switch between different views of the entity.

Figure 1–6 Details Window

Order Detail

SaveHelp

Order

Enterprise: DEFAULT
Order #: Y100000080
Order Type: Sales Order

Buyer: DEFAULT
Status: Created
Carrier/Service: USPS Priority Mail

Seller: DEFAULT
Order Date: 06/04/2004
Requested Delivery Date: 06/05/2004

Ship To

ABC
01876 US

Bill To

XYZ
01876 US

Charges

Line Sub Total200.00+
Total Charges103.00+
Total Tax0.00+
Total Discount1.00-
Grand Total\$ 302.00

Payment Info

StatusAuthorized
TypeCREDIT_CARD
Authorized0.00
Collected20.00

Order Lines

View DetailsView InstructionsView Kit ComponentsView Audits

Line	Item ID	PC	UOM	Description	Recv Node	Ship Node	Delivery Date	Line Qty	Amount	Status
1	proditem				receivingNode	shipNode		100.00	\$ 301.00	Created
5	proditem				receivingNode	shipNode		100.00	\$ 0.00	Created

Service Requests

View DetailsView InstructionsPlan AppointmentUnschedule

Line	Item ID	UOM	Description	Ship Node	Appointment	Appointment Status	Amount	Status
Z	xx	hrs		shipNode		Not Taken	\$ 0.00	Cancelled
0	psl	hrs		shipNode		Sequencing Wait	\$ 0.00	Created
2	xx	hrs		shipNode		Sequencing Wait	\$ 0.00	Created

Delivery Requests

View DetailsView InstructionsPlan AppointmentUnschedule

Line	Item ID	UOM	Description	Ship Node	Appointment	Appointment Status	Amount	Status
2	TV Delivery	HR		shipNode		Not Taken	\$ 0.00	Cancelled
3	TV Delivery	HR		shipNode		Not Taken	\$ 0.00	Cancelled

1.3.4 Action Bar

Action bars display the available actions that can be performed on a type of entity. If the user interface is being customized, the Action bar is described as an "inner panel title bar" in the *Sterling Supply Chain Applications Customization Guide*.

Figure 1–7 Action Bar (Actions)




Actions are indicated by the  icon. For any action bar throughout the application, only four actions are displayed. If additional actions are available a More Actions icon (see [Figure 1–7](#) above) is displayed on the action bar which can be chosen to reveal the remaining actions.

Figure 1–8 Action Bar (View Icons)

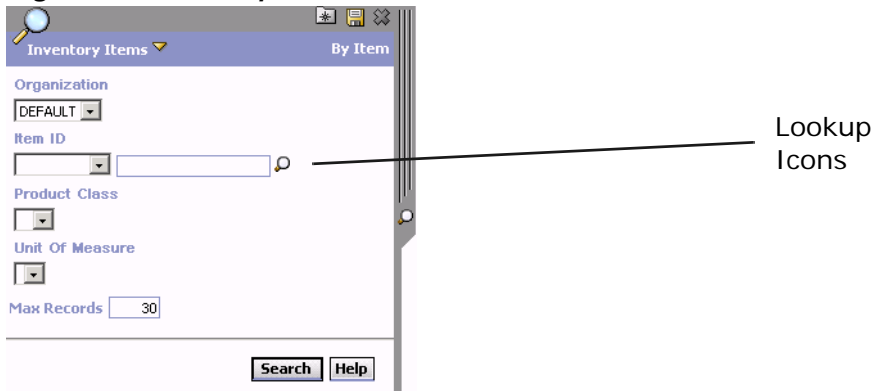


On a details window an action bar may also display view icons. You can use these icons to view any related detail windows for the entity you are viewing.

1.3.5 Lookup Icons

Many fields throughout the Application Consoles have a lookup icon that can be used to find additional records as they pertain to that field. For example, on the Inventory Items window, the Item ID field have lookup icons that you can use to locate the applicable item ID to populate the field.

Figure 1–9 Lookup Icons



When you select a lookup icon, a search pop-up window pertaining to the field appears. You can use the search window to locate the applicable object. You can then choose the object to populate the field.

1.3.6 Tables

1.3.6.1 Sorting Tables

Many tables contain columns that can be sorted.

To sort tables:

1. Right-click the header row of a standard table. A context menu appears.
2. From the context menu, select 'Sort Column' which will only be displayed for sortable columns.
3. Copy the data that you want and paste it into the spreadsheet application of your choice.

1.3.6.2 Exporting Data

Throughout the Sterling Supply Chain Application Consoles, you can export data from standard tables into an external spreadsheet. Standard tables consist of column headers and rows that contain data.

Approximately 90-95 percent of the tables in the Application Consoles are standard tables.

Note that tables that contain extra functionality (for example, rows that expand or collapse, cells that are further split into rows and columns, and cells that are editable) cannot be exported.

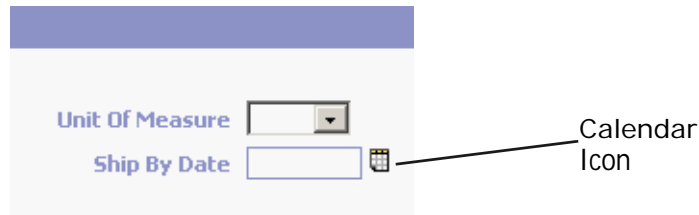
To export data to a spreadsheet:

1. Right-click the header row of a standard table. A context menu appears.
2. From the context menu, select Export Table Data. All of the table's data is displayed, with the row and column format maintained.
3. From the web page, choose the Copy Source button.
4. Paste the data into a spreadsheet application.
5. From the web page, choose the Close button. The prior Console view displays.

1.3.7 Date and Time Icons

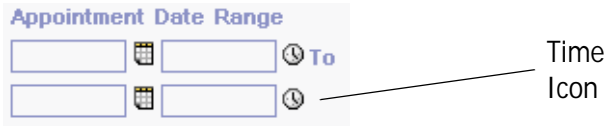
Date fields throughout the Application Consoles have a calendar icon that can be used to find a date as it pertains to that field. When you click on this icon a small calendar displays. You can navigate through this calendar to determine the appropriate date. For example, on the Adjust Inventory window, the Ship By field has a calendar icon that you can use to verify the appropriate ship by date to populate the field.

Figure 1–10 *Calendar Icons*



Similarly, time fields throughout the Application Consoles have a time icon that can be used to enter the time as it pertains to that field. When you click on the icon, a small popup window appears allowing you to select any time of day, or to click on the current time button to stamp it as the current system time.

Figure 1–11 Time Icons



Time should be entered in a 24 hour time format everywhere throughout the Application Consoles.

1.3.8 Using Online Help

Each window has a Help button. Choose this button to open online help that contains information relevant to the current window.

1.3.9 Performing a Modification

When a modification is performed in many of the Consoles, you are presented with a Modification Reason window.

Modification Reason

Reason Code

Reason Text

OK Cancel

This window allows you to provide information as to why you are modifying a particular entity. This information can be viewed in the entity's audit details.

To use the Modification Reason window, select the applicable Reason Code from a list of configured codes and enter any additional comments about the modification in Reason Text. Once you have entered all of the applicable information, choose OK.

1.4 Login Permissions

This section explains the difference in the Sterling Supply Chain Applications Console application when you are logged in for the following types of users:

- Hub Users (Users belonging to the "DEFAULT" organization)
- Enterprise Users
- Buyer and Seller Users
- Node Users
- Carrier User

It is important to note that the difference in behavior in the Sterling Supply Chain Applications Console screens is **only** a difference in what data that user can view and modify. Screen level access is only controlled by user group permissions. Therefore, a user can navigate to all screens within the Sterling Supply Chain Applications Console as dictated by the user groups that have been assigned to the user. The type of user does not affect this in any way. For example, if a node user has been assigned to the Administrator user group (which contains permissions for all screens), then that user will be able to view and modify orders in the sales order console.

Access to the Sterling Supply Chain Applications Configurator is granted only to Hub and Enterprise users. However, access to the Configurator can be denied for a specific Hub or Enterprise user through user group definitions. Access to the Configurator is not allowed for any other type of user regardless of the user group definitions.

Hub Users

Hub users are those belonging to the "DEFAULT" organization. By default, Hub users have access to all data for all enterprises. Individual Hub users can be restricted to view data for specific enterprises by creating a data security group for that user.

Enterprise Users

By default, enterprise users have access to all data for:

- Itself

- Any enterprise that is a child organization in the organization hierarchy.

Individual enterprise users can be restricted to view data for a subset of the default list of enterprises by creating a data security group for that user.

Buyer and Seller Users

Users for Buyer or Seller organizations have access to data in which their organization plays the role of the buyer or seller on that data entity. For example, a particular seller user can only see orders in which that user's organization is the seller on the order document. Not all data elements have a seller or buyer associated to them. Therefore, certain screens that are not necessarily relevant for buyer or seller users, and permission should be revoked for such screens for buyer or seller users.

Node Users

Node users have access to data in which they are the node associated with that data element. For example, a node user can view all order releases in which they are the ship node OR receiving node on the order release. Not all data elements have a node associated to them. Additionally, when viewing inventory in the inventory console, a node user can only view and modify inventory for its own node. Therefore, certain screens may not be relevant for a node user to view. For example, in the order console, node users can see all orders in which their node's owner organization is the buyer, seller, or enterprise on the order. If you do not want a particular node user to have access to these orders, permission for these screens should be revoked for that user.

Carrier User

Carrier users have access to data in which they are the carrier associated with that data element. For example, a carrier organization user can view all orders in which they are the carrier shipping the order. Not all data elements have a carrier associated to them. Therefore, certain screens will not be relevant for a carrier user and permission should be revoked for such screens for a carrier user (for example, inventory console screens).

1.5 Customizations Available Throughout the Sterling Supply Chain Applications

You can perform several types of actions throughout the Sterling Supply Chain Applications application.

You can use the Sterling Supply Chain Application Consoles for:

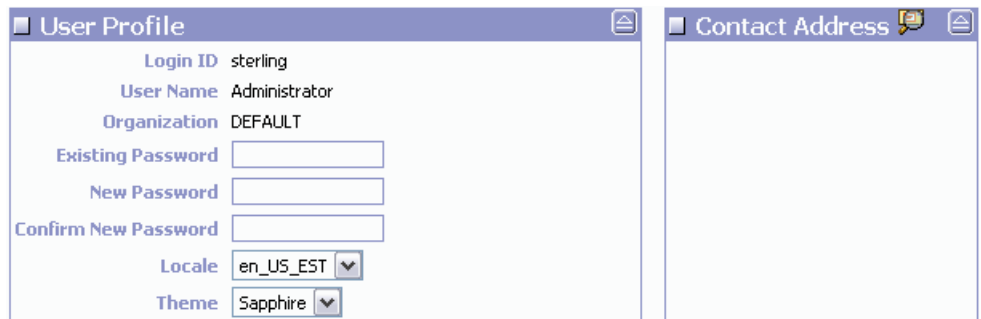
- [Modifying Your User Profile](#)
- [Changing Your Locale](#)
- [Changing the Theme in the Sterling Supply Chain Application Consoles](#)

1.5.1 Modifying Your User Profile

You can modify your user information, such as your password, locale, user interface theme, and contact address.

To modify your user profile:


1. From the navigation bar, choose . The User Profile and Contact Address window displays.



User Profile	
Login ID	sterling
User Name	Administrator
Organization	DEFAULT
Existing Password	<input type="password"/>
New Password	<input type="password"/>
Confirm New Password	<input type="password"/>
Locale	en_US_EST
Theme	Sapphire

Contact Address

2. In Existing Password, enter the existing password being used. This field is required if you are changing the user password.
3. In New Password, enter the password you want to use, if applicable.
4. In Confirm New Password, re-enter the password, if applicable.
5. From Locale, select the locale you are working in, if applicable.

6. From Theme, select the graphical color scheme you want to use for the Sterling Supply Chain Application Consoles, if applicable.
7. From the Contact Address panel, choose . The Modify Address pop-up window appears.
8. Modify the applicable information and choose the Save button.
9. From the User Profile window, choose the Save button.


1.5.2 Changing Your Locale

You can change the locale for your current session in the Sterling Supply Chain Application Consoles.

Note: When you sign in for your next session, the Sterling Supply Chain Application Consoles return to the default locale. For information about changing your default locale, see [Section 1.5.1, "Modifying Your User Profile"](#) on page 15.

Note: Throughout the Application Consoles, dates are displayed in the time zone corresponding to the login user's locale. When the date is not in that time zone, the time zone is shown next to the date.

To change the locale for your current session:


1. From the navigation bar, choose . The Locale drop-down menu is displayed.
2. Select the locale you want to change to for your current session. The Sterling Supply Chain Application Consoles convert to the selected locale.

1.5.3 Changing the Theme in the Sterling Supply Chain Application Consoles

You can change the theme for your current session in the Sterling Supply Chain Application Consoles.

Note: When you sign in for your next session, the Sterling Supply Chain Application Consoles returns to the default theme. For information about changing your default theme, see [Section 1.5.1, "Modifying Your User Profile"](#) on page 15.

To change the theme for your current session:

1. From the navigation bar, choose . The Theme drop-down menu is displayed.
2. Select the theme you want to change to for your current session. The Sterling Supply Chain Application Consoles convert to the selected theme.

1.6 User Permissions and Data Security

While working in the Sterling Supply Chain Application Consoles and using this guide, you may find that you may not be able to perform some of the actions detailed in this guide. What actions and consoles you have access to use is determined by permissions. Your permissions are set by your system administrator in the Sterling Supply Chain Applications Configurator. If you do not have permission to access or perform views and actions detailed in this guide, they do not appear in your session of the Sterling Supply Chain Application Consoles. If you need to access views or perform actions you do not have permissions for, contact your system administrator.

1.7 Troubleshooting Error Messages

If you have permissions to access the Configurator, you can look up descriptions, details, and tips on how to troubleshoot any of the system errors that are raised while using the Application Consoles. For more information, see the *Sterling Supply Chain Applications Platform Configuration Guide*.

Note: The generic behavior for input screens includes the retention of keyed values in the event that an error occurs.

1.8 Using Special Characters

Throughout the Sterling Supply Chain Applications Configurator there may be instances where you need to use special characters in data entry. For information regarding the use of special characters in the Sterling Supply Chain Applications, see the *Sterling Supply Chain Applications Customization Guide*.

Alert Console Screens

This chapter describes how to manage Alerts using the Alert Console.

Alerts are sent to predetermined queues within the Alert Console and can be assigned to a specific user within that queue. Queues are used to direct specific types of alerts to a specific group of users. Users who belong to a queue use the Alert Console to view and close alerts.

Queues can also be used to prioritize alerts. In the Alert Console, alerts in high priority queues appear at the top of the alert list. You can escalate an alert by assigning it to a queue of higher priority.

In the Alert Console, alerts are listed by identification ID, type, and the date the alerts were raised.

Some alerts are closed automatically when resolved. When the following alerts are resolved, they are automatically closed and removed from your queue:

- **INCOMPLETE_PAYMENT_INFO** - If an order's payment information is incomplete, the alert is automatically closed when payment information is received.
- **BACKORDER_AT_CREATE** - If an order is backordered, the alert is automatically closed once the order is scheduled.
- **FAILED_AUTH** - If an order is not authorized, the alert is automatically closed once it is authorized.
- **ON_FAILURE** - If a credit card order fails, but is then cleared, the alert is automatically closed when it moves from failed charge to paid status.

Alert Consolidation

You can consolidate alerts based on the day or the hour of occurrence. For more information on the alert consolidation details and their limitations refer to the *Sterling Supply Chain Applications Product Concepts*.

Note: However, when the Sterling Supply Chain Applications agent framework creates exceptions they are consolidated by Date, ErrorCode etc.,. The inbox references for such agent exceptions are just these aggregation parameters. These alerts are different compared to the ones created by the `raiseEvent` API, since one alert can correspond to more than one actual data record. In this case a context reference like order number is not applicable.

2.1 Alerts Search by Queue User

This screen allows you to search for alerts by queue user. Clicking the search button takes you to the [Alert List for Search by Queue User and Reference](#) screen.

Note: We recommend that you 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 2–1 Alerts Search by Queue User

Fields	
Alert ID	Enter the identification number of the alert you are searching for, if applicable.
Alert Type	Enter the type of alerts you are searching for, if applicable.
Queue	Enter the queue that the alerts you are searching for are in, if applicable.
Assigned to User	Enter the user ID of the user the alerts you are searching for belong to, if applicable.

Table 2–1 Alerts Search by Queue User

Last Raised On Date	Enter the date and time ranges to search.
Raised Count	Enter the number of times the alert has been raised. This field is more appropriate for consolidated alerts.
Only Subscribed Queues	Select this if you only want to search for alerts in the queues you are subscribed to, if applicable.
Only Unassigned Alerts	Select this if you only want to search for alerts that have not be assigned yet, if applicable.
Alert drop-down	Select one of the following options: Open Alerts - to search for alerts that have not been closed yet. Closed Alerts - to search for alerts that are no longer open. All - to search for both unresolved and closed alerts, if applicable.
Max Records	Enter the maximum number of alerts you want returned from your search.

2.2 Alerts Search by Reference

This screen allows you to search for alerts by reference. Clicking the search button takes you to the [Alert List for Search by Queue User and Reference](#) screen.

Note: We recommend that you 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 2–2 Alerts Search by Reference

Fields	
Item ID	<p>Enter the item ID contained in the alert you are searching for, if applicable.</p> <p>Note: This field can only be searched on if its values have been configured for a service in the Configurator.</p>

Table 2–2 Alerts Search by Reference

Order No	Enter the order number contained in the alert you are searching for, if applicable.
Ship Node	Enter the ship node contained in the alert you are searching for, if applicable.
Reference Name	Enter the reference name contained in the alert you are searching for, if applicable.
Reference Value	Enter the reference value contained in the alert you are searching for, if applicable.
Last Raised On Date	Enter the date range of the alert you are searching for, if applicable.
Raised Count	Enter the number of times the alert has been raised. This field is more appropriate for consolidated alerts.
Only Subscribed Queues	Select this if you only want to search for alerts in the queues you are subscribed to, if applicable.
Only Unassigned	Select this if you only want to search for alerts that have not be assigned yet, if applicable.
Max Records	Enter the maximum number of alerts you want returned from your search.

Note: The MessageKey value that determines the members of a particular exception group can be queried by inputting Reference Name as 'MESSAGEKEY'.

2.3 Alerts Search By Order

This screen allows you to search for alerts by order. Clicking the search button takes you to the [Alert List for Search by Order](#) screen.

Note: We recommend that you 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 2–3 Alert Search by Order

Fields	
Document Type	Select the appropriate document type contained in the alert you are searching 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.
Alert Type	Enter the type of alerts you are searching for, if applicable.
Queue	Enter the queue that the alerts you are searching for are in, if applicable.
Assigned to User	Enter the user ID of the user the alerts you are searching for belong to, if applicable.
Last Raised on Date	Enter the date and time ranges to search.
Raised Count	Enter the number of times the alert has been raised. This field is more appropriate for consolidated alerts.
Alert Status	Select any or all of the following alert statuses: Open - to search for alerts that are in open status. Closed - to search for alerts that are no longer in open or WIP status. WIP - to search for alerts that are in Work In Progress (WIP) status.
Order Number	Enter the order number contained in the alerts you are searching for, if applicable.
Buyer	Enter the Buyer of the order contained in the alerts you want to search for, if applicable.
Seller	Enter the Seller of the order contained in the alerts you want to search for, if applicable.
Total Amount	Enter the Total Amount of the order contained in the alerts you want to search for, if applicable.
Carrier Service	Enter the Carrier Service of any order line for the order contained in the alerts you want to search for, if applicable.
Payment Status	Enter the Payment Status of the order contained in the alerts you want to search for, if applicable.

Table 2–3 Alert Search by Order

Requested Delivery Date	Enter the requested delivery date range for the order contained in the alerts you want to search for, if applicable.
Max Records	Enter the maximum number of alerts you want returned from your search.

Note: The MessageKey value that determines the members of a particular exception group can be queried by inputting Reference Name is 'MESSAGEKEY'.

2.4 Alerts List in Homepage

A list of alerts is displayed in the homepage of the Sterling Supply Chain Application Consoles. The fields descriptions of that panel is described in the following table:

Table 2–4 Alert List in Homepage

Actions	
View Details	This action takes you to the Alert Details screen to view the details of the selected alerts.
More Alerts	This action takes you to the Alert List for Search by Queue User and Reference screen to view additional alerts raised.
Fields	
Alert ID	The alert ID.
Type	The type of alert raised.
Description	A brief description of the alert.
Queue	The queue the alert is assigned to.
Priority	The alert's priority.
Count	The number of consolidated alerts belonging to the same alert ID.
Last Raised On Date	The date the alert was last raised.
Created For	The document type for which the alert was created.

2.5 Alert List for Search by Queue User and Reference

This Alert List window displays the results of an alert search by queue user. You can perform actions on a single alert or multiple alerts by selecting the check boxes of the alerts you want to perform an action on and choosing the applicable action from the action bar. You can also link directly to the document the alert is associated with by selecting the applicable Alert ID link from the Created For column.

Table 2–5 Alert List for Search by Queue User and Reference

Actions	
View Details	This action button takes you to the Alert Details screen which shows details for the selected alerts.
Assign to User	This action button takes you to the Assign To User screen which allows you to assign the alert to a different user.
Assign to Queue	This action button takes you to the Assign To Queue screen which allows you to assign the alert to a different queue.
Close	This action button closes the alert.
Mark as WIP	This action button marks the alert as a Work In Progress.
Remove from WIP	This action button marks the alert as open.
UnAssign	The action button unassigns the alert from the user to which it used to be assigned.
Fields	
Alert ID	The alert ID.
Alert Type	The type of alert raised.
Description	A brief description of the alert.
Queue	The queue the alert is assigned to.
Priority	The alert's priority.
Assigned To User	The user the alert is assigned to.
Alert Status	The current status of the alert.
Last Raised On Date	The date the alert was last raised.

Table 2–5 Alert List for Search by Queue User and Reference

Raised Count	The number of consolidated alerts belonging to the same alert ID.
Created For	The document type for which the alert was created.
Details	Specific details pertaining to the alert.

2.6 Alert List for Search by Order

The alert search results by are displayed in the alert list window. You can perform actions on a single alert or multiple alerts by selecting the check boxes of the alerts you want to perform an action on and choosing the applicable action from the action bar. You can also link directly to the document the alert is associated with by selecting the applicable Alert ID link from the Created For column.

Table 2–6 Alert List for Search by Order

Actions	
View Details	This action button takes you to the Alert Details screen which shows details for the selected alerts.
Assign to User	This action button takes you to the Assign To User screen which allows you to assign the selected alerts to a different user.
Assign to Queue	This action button takes you to the Assign To Queue screen which allows you to assign the selected alerts to a different queue.
Close	This action button closes the selected alerts.
Mark as WIP	This action button marks the selected alerts as a Work In Progress.
Remove from WIP	This action button marks selected the alerts as open.
UnAssign	The action button unassigns the selected alerts from the user to which it used to be assigned.
Fields	
Alert ID	The alert ID.
Alert Type	The type of alert raised.
Queue	The queue the alert is assigned to.

Table 2–6 Alert List for Search by Order

Assigned To User	The user the alert is assigned to.
Last Raised On	The date the alert was last raised.
Alert Status	The current status of the alert.
Created For	The document type for which the alert was created.
Enterprise Code	Enterprise code of the order contained in the alerts.
Buyer	Buyer of the order contained in the alerts.
Seller	Seller of the order contained in the alerts.
Total Amount	Total amount of the order contained in the alerts.
Carrier Service	The Carrier Service of any order line for the order contained in the alerts
Payment Status	Payment Status for the order contained in the alerts.
Requested Delivery Date	The requested delivery date range for the order contained in the alerts.
Details	Specific details pertaining to the alert.

2.7 Alert Details

This screen shows the details of an alert.

Table 2–7 Alert Detail Screen, Alert

Actions	
Assign to User	This action button takes you to the Assign To User screen which allows you to assign the alert to a different user.
Assign to Queue	This action button takes you to the Assign To Queue screen which allows you to assign the alert to a different queue.
Close	This action button closes the alert.
Mark as WIP	This action button marks the alert as a Work In Progress.
Remove from WIP	This action button marks the alert as open.
UnAssign	The action button unassigns the alert from the user to which it used to be assigned.

Table 2–7 Alert Detail Screen, Alert

Fields	
Alert ID	The unique identification number of the alert.
Alert Type	The type of alert. For example, CHARGE_FAILED or INVENTORY_CHANGED.
Description	A description of the action taken when the exception was raised.
Queue	The name of the queue where the alert is assigned.
Assigned to User	The user name of the alert's assigned user.
Alert Status	The status of the raised alert.
Ship Node	The node that fulfilled the order.
Order No.	The order number associated with the alert, if applicable.
Order Status	The status of the order associated with the alert.
Supplier	The Seller that fulfilled the order.
Item ID	The identification number of the item associated with the alert, if applicable.
Raised By Transaction	The transaction that raised the alert.
First Raised On	The date the alert was first raised.
Last Raised On	The date the alert was last raised.
Raised Count	The number of consolidated alerts belonging to the same alert ID.
Resolved On	The date the alert was closed.
Resolved By	If the alert is closed, the name of the user who closed it is displayed in this field.
Description	A brief description of the alert.
To Queue	If the alert was assigned to a new queue, this field displays the new queue.

Table 2–8 Alert Detail Screen, Comments

Actions	
Add Comment	This action button takes you to the Add Comment screen which allows you to add comments to the alert.
Fields	
Comment Text	Any additional comments made about the alert.
Logged On	The date the comment was logged.
Logged By	The user who logged the comment.

Table 2–9 Alert Detail Screen, References

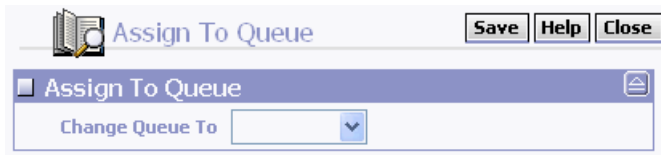
Fields	
Reference Name	This field is customizable.
Reference Value	This field is customizable.

Table 2–10 Alert Detail Screen, Audits

Fields	
Time	The date and time a modification was made to the alert.
Transaction Type	The transaction performed on the alert.
From User	If the alert was assigned to a new user, this field displays the original user.
To User	If the alert was assigned to a new user, this field displays the new user.
From Queue	If the alert was assigned to a new queue, this field displays the original queue.
To Queue	If the alert was assigned to a new queue, this field displays the new queue.

2.8 Assign To Queue

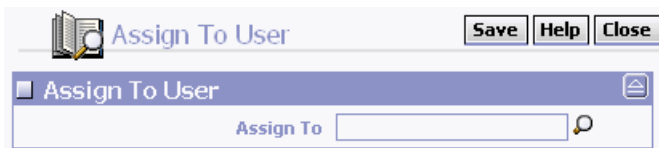
To assign an alert to a different queue, select the appropriate queue from the down-down list and click Save.



The 'Assign To Queue' dialog box features a title bar with a document icon and the text 'Assign To Queue'. To the right of the title bar are three buttons: 'Save', 'Help', and 'Close'. Below the title bar is a sub-header area with a small square icon and the text 'Assign To Queue'. Underneath this is a label 'Change Queue To' followed by a dropdown menu with a downward-pointing arrow.

2.9 Assign To User

To assign an alert to a different user, type the user name in the text field or look him up using the [User Lookup](#) and click Save.



The 'Assign To User' dialog box has a title bar with a document icon and the text 'Assign To User'. To the right of the title bar are three buttons: 'Save', 'Help', and 'Close'. Below the title bar is a sub-header area with a small square icon and the text 'Assign To User'. Underneath this is a label 'Assign To' followed by a text input field and a magnifying glass icon.

Note: No validation is made to verify a user can access the specified queue.

2.10 Add Comment

To add a comment to an alert, enter the comment in the text field, and click Save.



Sterling Rich Client Platform Alert Screens

This chapter describes how to manage alerts using the Sterling RCP-based Alert screens.

Alerts are sent to predetermined queues within the Alert Screens, which can be assigned to a specific user within that queue. Queues are used to direct specific types of alerts to a specific group of users. Users who belong to a queue use the Alert Detail screen to view and close alerts.

Queues can also be used to prioritize alerts. You can escalate an alert by assigning it to a queue of higher priority.

Alert Consolidation

You can consolidate alerts based on the day or hour of alert occurrence. For more information about the alert consolidation details and their limitations, see the *Sterling Supply Chain Applications Product Concepts*.

Note: When the Sterling Supply Chain Applications agent framework creates exceptions, they are consolidated by Date, ErrorCode, and so forth. The inbox references for such agent exceptions are these aggregation parameters. These alerts are different compared to the ones created by the raiseEvent API since one alert can correspond to more than one actual data record. In this case, a context reference such as order number is not applicable.

3.1 Alerts Search Screen

You can enter the criteria to search for the alerts created.

Table 3–1 Alert Search Screen

Field	Description
Alert Type	Select the appropriate alert type from the drop-down list.
Alert Status	Choose an appropriate alert status.
Queue	Select the queue from the drop-down list that contains the alert you are searching for.
Order No	Select the order number contained in the alert you are searching for from the drop-down list.
Assigned to User	Select the user ID of the user the alerts you are searching for belong to from the drop-down list.
Order Total	Select the total amount of the order contained in the alerts you want to search for from the drop-down list.
Raised On From... To...	Choose the date range between which the alert was raised.
Follow-up Date From... To...	Choose the date range between which the follow-up for the alert was done.
Carrier/Service	Select the carrier service of any order line for the order contained in the alerts you want to search for from the drop-down list.
Raised Count	Select the number of times an alert is raised. This field is more appropriate for consolidated alerts from the drop-down list.
Node	Select the node assigned to an alert.
Priority	Select the priority you want to assign for the alert from the drop-down list.
Shipment No	Select the shipment number assigned to an alert.
Supplier ID	Select the identifier of a supplier assigned to an alert.

3.1.1 View Alert Details

You can view the details of an alert that meets your search criteria.

If there are multiple alerts that matches your search criteria, a list of alerts display. Click the appropriate alert to view the [Alert Details Screen](#) displays.

Table 3–2 View Alert Details

Field	Description
Alert ID	This identifier of the alert.
Alert Type	The type of alert.
Queue	The queue to which the alert is assigned.
Raised On	The date on which the alert was raised.
Last occurrence	The date on which the alert was last raised.
Order No	The order number for which the alert was raised.
Shipment No	The shipment number for which the alert was raised.
Supplier ID	The identifier of the supplier.
Priority	The priority of the alert.

3.2 Alert Details Screen

This screen displays the details of an alert.

Table 3–3 Alert Detail Screen, Alert

Actions	
Assign to User	This action takes you to the Assign to User screen which allows you to assign the alert to a different user.
Assign to Queue	This action takes you to the Assign to Queue screen which allows you to assign the alert to a different queue.
Close	This action closes the alert.
Mark as WIP	This action marks the alert as a Work In Progress.
Remove from WIP	This action marks the alert as open.
Unassign	This action unassigns an alert from the user.
Change Priority	This action takes you to Change Priority screen which enables you to change the priority of an alert.
Fields	
Alert ID	The unique identification number of the alert.

Table 3–3 Alert Detail Screen, Alert

Alert Type	The type of alert. For example, CHARGE_FAILED or INVENTORY_CHANGED.
Description	A description of the action taken when the exception was raised.
Queue	The name of the queue where the alert is assigned.
Assigned to User	The user name of the alert's assigned user.
Alert Status	The status of the raised alert.
Ship Node	The node that fulfilled the order.
Order No.	The order number associated with the alert, if applicable.
Order Status	The status of the order associated with the alert.
Supplier	The Seller that fulfilled the order.
Item ID	The identification number of the item associated with the alert, if applicable.
Raised By Transaction	The transaction that raised the alert.
First Raised On	The date the alert was first raised.
Last Raised On	The date the alert was last raised.
Raised Count	The number of consolidated alerts belonging to the same alert ID.
Resolved On	The date the alert was closed.
Resolved By	If the alert is closed, the name of the user who closed it is displayed in this field.
Description	A brief description of the alert.
To Queue	If the alert was assigned to a new queue, this field displays the new queue.

Table 3–4 Alert Detail Screen, Comments

Actions	
Add Comment	This action button takes you to the Add Comment screen which allows you to add comments to the alert. For more information about adding comments to a alert, see Section 3.3, "Add Comments" .

Table 3–4 Alert Detail Screen, Comments

Fields	
Comment Text	Any additional comments made about the alert.
Logged On	The date the comment was logged.
Logged By	The user who logged the comment.

Table 3–5 Alert Detail Screen, References

Fields	
Reference Name	This field is customizable.
Reference Value	This field is customizable.

Table 3–6 Alert Detail Screen, Audits

Fields	
Time	The date and time a modification was made to the alert.
Transaction Type	The transaction performed on the alert.
From User	If the alert was assigned to a new user, this field displays the original user.
To User	If the alert was assigned to a new user, this field displays the new user.
From Queue	If the alert was assigned to a new queue, this field displays the original queue.
To Queue	If the alert was assigned to a new queue, this field displays the new queue.

3.3 Add Comments

This screen enables you to add comments to an alert.

Table 3–7 Add Comments

Field	Description
Add Comments Info	
Comments	Enter the comments you want to add to an alert.

3.4 Assign to User

Sometimes, an alert task needs to be addressed by a particular user. In such situations, you can assign alerts to a specific user.

Table 3–8 Assign To User

Field	Description
Currently Assigned To User	The user, the alert is currently assigned to.
Assign To User	Enter the user you want to assign the alert to.
Find User	
User ID Contains	Enter the identifier of the user to search for the user you want to assign the alert.
User Name Contains	Enter the name of the user to search for the user you want to assign the alert.
Action	
Find User	This action when clicked displays the list of users based on the search criteria.
Fields	
User ID	This displays the list of user identifiers based on the search criteria.
User Name	This displays the list of user names based on the search criteria.

3.5 Assign to Queue

In this screen, you can move a particular alert to a different queue.

Table 3–9 Assign to Queue

Field	Description
Currently Assigned To Queue	The queue to which the alert is currently assigned.
Assign To Queue	Enter the queue you want to assign the alert to.
Find Queue	
Queue ID Contains	Enter the queue identifier to search for the queue you want to assign the alert.
Queue Name Contains	Enter the name of the queue to search for the queue you want to assign the alert.
Action	
Find Queue	This action when clicked displays the list of queues based on the search criteria.
Fields	
Queue ID	This displays the list of queue identifiers based on the search criteria.
Queue Name	This displays the list of queue names based on the search criteria.

3.6 Close Alerts

You can close alerts that have been resolved or are no longer valid. For more information about closing alerts, see the [Alert Details Screen](#).

3.7 Mark As WIP

You can mark the status of alert as Work in Progress (WIP). For more information about marking an alert as WIP, see [Alert Details Screen](#).

3.8 Unassign

You can unassign alerts from a user that are already assigned. For more information about unassigning alerts, see the [Alert Details Screen](#).

3.9 Change Priority

You can change the priority of an alert in this screen.

Table 3–10 Change Priority

Field	Description
New Priority	Enter the priority of the alert you want to change to.

Exception Console Screens

The Exception Console is used to manage Service Definition Framework exceptions and exception groups.

You can use the Exception Console to handle Service Definition Framework exceptions.

The Exception Console provides you the ability to:

- View all errors logged by the Service Definition Framework
- Modify the original XML that caused the error
- Resubmit a modified XML for reprocessing, for APIs defined as reprocessable

Important: An Integration Adapter, configured for the specified Runtime ID, must be running in order to reprocess errors in Pending Reprocess state.

You can also use the Exception Console to handle Service Definition Framework exceptions groups. An exception group consists of multiple APIs that are grouped together to ensure that when one fails, subsequent transactions grouped across APIs also fail. For example, If the `createOrder` API fails for an order, any `changeOrder` API calls for that order automatically fail without the API being called. Once the `createOrder` error is fixed, the `changeOrder` data is also submitted to be reprocessed. By default, all errors in a group are reprocessed in arrival sequence when submitted for reprocessing.

The Exception Console provides you the ability to:

- View all error groups logged by the Service Definition Framework

- Resequence the order of the APIs
- Edit individual exception's XMLs then resubmit the entire group of exceptions for reprocessing

Important: An Integration Adapter, configured for the specified Runtime ID, must be running in order to reprocess errors in Pending Reprocess state.

See the *Sterling Supply Chain Applications Platform Configuration Guide* for information on how to configure a service with exception groups. See the *Sterling Supply Chain Applications Customization Guide* for information on coding your own user exit to implement exception groups.

4.1 Exceptions Search By All Attributes

This screen allows you to search for Service Definition Framework Exceptions. Clicking the search button takes you to the [Exception List](#) screen.

Note: We recommend that you 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 4–1 *Exceptions Search*

Fields	
Service Name	Enter the interface service (defined in the Configurator) from which the error you are searching for was generated, if applicable. For more information about Service Definition Framework configuration, see the <i>Sterling Supply Chain Applications Platform Configuration Guide</i> .
Sub Service Name	Enter the Runtime ID from which the error you are searching for was generated, if applicable.

Table 4–1 Exceptions Search

Queue ID	Select the queue (defined in the Configurator) to which the error was assigned, if applicable. For more information about Service Definition Framework configuration, see the <i>Sterling Supply Chain Applications Platform Configuration Guide</i> .
Exception State	<p>Select from the following exception states, if applicable:</p> <ul style="list-style-type: none"> • Initial - The error is ready to be reprocessed or ignored • Saved - The XML has been modified and saved and is ready to be reprocessed • Modified - The error has been modified • Pending Reprocess - The error is awaiting reprocessing • Fixed - The error is now fixed (API succeeded) • Ignored - Reprocessing is not desired for the API call <p>Note: Only errors in Initial state can be reprocessed, ignored, or saved.</p>
Error Code	Enter the error code for this exception
Date	Enter the date range in which the error was logged, if applicable.
Max Records	Enter the maximum amount of results you want returned from your search.

4.2 Exception List

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

Table 4–2 Exception List

Actions	
Ignore	This action button removes the selected exception from the exception list. Once an exception is ignored, the error cannot be reprocessed.

Table 4–2 Exception List

Reprocess	This action button submits the selected exceptions for reprocessing by an Integration Adapter. Note: Only exceptions in Initial or Saved states can be reprocessed. Reprocessing could result in another error if the API fails again.
View Details	This action button takes you to the Exception Details screen which shows details for the selected exceptions.
Fields	
Error ID	The integration exception ID.
Service Name	The the service from which the exception was generated.
Sub Service Name	The sub-service that caused the exception upon execution.
Created On	The date the exception was created.
Queue ID	The queue the exception was assigned to.
Exception State	The state of the exception. Can be Initial, Modified, Fixed, or Ignored.
Error Code	The error code for this exception.
Error Message	The error message for this exception.

4.3 Exception Details

This screen shows the details for an exception.

Table 4–3 Exception Details Screen, Error

Actions	
Ignore	This action button ignores the exception whose details you’re viewing. Once an exception is ignored, the error cannot be reprocessed.

Table 4–3 Exception Details Screen, Error

Reprocess	This action button submits the exception for reprocessing by an Integration Adapter. Note: Only exceptions in Initial or Saved states can be reprocessed. Reprocessing could result in another error if the API fails again.
Fields	
Integration Error ID	The unique ID of the integration exception.
Service Name	The the service from which the exception was generated.
Sub Service Name	The sub-service that caused the exception upon execution.
Queue ID	The queue the exception was assigned to.

Table 4–4 Exception Details Screen, Input XML

The API's input XML is displayed in the text area. To save modified exceptions so that they may be submitted and reprocessed at a later time, make the necessary changes to the input XML and click Save.
--

Table 4–5 Exception Details Screen, Error XML

The API's error XML is displayed in the text area.
--

Table 4–6 Exception Details Screen, Error History

Fields	
Error ID	The unique ID of the exception.
Input XML	Link to the API's input XML.
Error XML	Link to the error XML generated by the API.
Created On	The date the exception was created.
Queue ID	The queue the exception was assigned to.
Exception State	The state of the exception. Can be Initial, Modified, Fixed, or Ignored.

Table 4–6 Exception Details Screen, Error History

Error Code	The error code for this exception.
Error Message	The error message for this exception.

4.4 Exception Groups Search by All Attributes

This screen allows you to search for Service Definition Framework Execution Groups. The states in the exception state drop-down have the following meanings:

- Initial - The error is ready to be reprocessed or ignored
- Saved - The XML has been modified and saved and is ready to be reprocessed
- Modified - The error has been modified
- Pending Reprocess - The error is awaiting reprocessing
- Fixed - The error is now fixed (API succeeded)
- Ignored - Reprocessing is not desired for the API call

Clicking the search button takes you to the [Exception Group List](#) screen.

Note: We recommend that you do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

4.5 Exception Group List

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

Table 4–7 Exception Group List

Actions	
View Details	This action button takes you to the Exception Group Details screen which shows details for the selected exceptions.

Table 4–7 Exception Group List

Fields	
Error Group ID	The integration exception group ID.
Exception Group Name	The name of the exception group.
Created On	The date the exception was created on.
Queue ID	The queue the exception is assigned to.

4.6 Exception Group Details

This screen shows the details for an exception group.

Table 4–8 Exception Group Details Screen, Error Group

Actions	
ReprocessAll	<p>This action button allows you to reprocess all the errors within that displayed exception group.</p> <p>Modify and save the input XML of individual errors in the group, if necessary by choosing the Error ID link. Click ReprocessAll, and all errors in the exception group are reprocessed in the sequence shown from top to bottom.</p> <p>Note: Errors within an exception group cannot be reprocessed individually.</p>
Fields	
Exception Group ID	The unique ID of the exception group.
Exception Group Name	The name of the exception group.

Table 4–9 Exception Group Screen, Error

Actions	
Ignore	<p>This action button allows you to ignore all exceptions within an exception group.</p> <p>Note: Individual errors in an exception group can be ignored. An entire exception group cannot be ignored. You must ignore each error to ignore an entire group.</p>
Fields	

Table 4–9 Exception Group Screen, Error

Sequence No.	<p>The sequence the exception occurred in.</p> <p>To resequence a Service Definition Framework Exception Group, modify the values in the Sequence No. text boxes to reflect the new order, and click Save.</p> <ul style="list-style-type: none"> • Increase the sequence number to move an error down the list (executed later in the sequence). • Decrease the sequence number to move an error up the list (executed earlier in the sequence). <p>Note: The sequence values are always displayed as multiples of 10, regardless of what numbers were entered. For example, if there are three exceptions and you resequence them using the values 1, 2, and 3. When you save, the resequenced exceptions appear as 10, 20, and 30.</p>
Error ID	The unique ID of the exception.
Service Name	The service associated with the exception.
Sub Service Name	The sub-service that caused the exception upon execution.
Created On	The date the exception was created on.
Queue ID	The queue the exception is assigned to.
Exception State	The state of the exception. Can be Initial, Modified, Fixed, or Ignored.
Error Code	The error code associated with the exception.
Error Message	The error message associated with the exception.

Document Template Screens

The Create Template Console is used to create template orders for use in the Template Console.

You can use the Template Console to maintain template orders and create actual sales orders and purchase orders from them. Template orders are used in scenarios where a Buyer makes a similar sales order or purchase order on a regular basis. The template order can be used to create an order with the generic information you have entered already populating the applicable fields.

5.1 Template Order Entry

This screen allows you to create a template based on which orders may be created.

Table 5–1 *Template Order Screen, Header Details*

Fields	
Document Type	Select the document type associated with the template.
Enterprise	Select the Enterprise associated with the template order.
Buyer	Enter the Buyer associated with the template order.
Seller	Enter the Seller associated with the template order.
Order #	Enter the order number for the initial template order.
Order Name	Enter the order name as per your business practices.
Currency	Select the currency to be used for orders created from the template order.

Table 5–2 Template Order Screen, Instructions

Fields	
Instruction Type	Select any instruction types, such as Gift, Pick, or Pack, you want to attach to the template order.
Text	Enter the details of the special instruction you want to attach to the template order.

5.2 Template Order Search

This screen allows you to search for previously defined template orders. Clicking the search button will take you to the [Template Order List](#) screen.

Note: We recommend that you 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 5–3 Template Order Search by All Attributes

Fields	
Document Type	Select the appropriate document type to search for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or choose Across Enterprises to use of all the Enterprises.
Order Number	Enter the order number of the template order you are searching for, if applicable.
Buyer	Enter the default Buyer associated with the template order(s) you want to search for, if applicable.
Seller	Enter the default Seller associated with the template order(s) you want to search for, if applicable.
Buyer Account Number	Enter the default Buyer’s account number associated with the template order(s) you are searching for, if applicable.
Max Records	Enter the maximum number of template orders you want returned from your search.

5.3 Template Order List

The Template List window displays the results of a template order search. You can perform actions on a single template order or multiple template orders by selecting the check box(es) of the template order(s) you want to perform an action on and choosing the applicable action from the action bar.

Table 5–4 Template Order List

Actions	
View Details	This action button takes you to the Template Order Details screen which shows details for the selected templates.
Remove	This action button removes the selected templates.
Fields	
Order #	The template order number.
Enterprise	The Enterprise associated with the template order.
Buyer	The Buyer associated with the template order
Seller	The Seller associated with the template order.
Order Name	The template order name.

5.4 Template Order Details

This screen shows the details for a template order.

Table 5–5 Template Order Detail Screen, Template Order




View Icons	
	Payment Information - This icon takes you to the Order Payment Information screen where you can view the payment information for the template order.
	More Attributes - This icon takes you to the More Template Order Attributes screen where you can specify additional attributes for Identification, Shipping and Financials.
	More Addresses - This icon takes you to the More Order Addresses screen where you can add or modify forwarding address.

Table 5–5 Template Order Detail Screen, Template Order


	Order Audits - This icon takes you to the Template Order Audits screen where you can view the list of audits done for that order.
Actions	
Create Order	This action creates a sales order, using this template order. For more information on sales orders, refer to the <i>Sterling Distributed Order Management User Guide</i> . Note: A Bill To address and order lines must be entered before a draft order can be confirmed.
Create Inbound Order	This action creates an inbound order, using this template order. For more information on inbound orders, refer to the <i>Sterling Supply Collaboration User Guide</i> . Note: A Bill To address and purchase order lines must be entered before a draft purchase order can be confirmed.
Fields	
Enterprise	The Enterprise associated with the template order.
Buyer	The Buyer associated with the template order.
Seller	The Seller associated with the template order.
Order #	The order number that is to be generated by the template order.
Document Type	The document of the template order.
Order Date	The date the template order was created.
Carrier/Service	The Carrier service used by the template order. This field can be modified.
Order Type	This field is customizable as per your business practices.
Default Template	Indicates if this template order is the default for the Buyer/Seller combination.

Table 5–6 Template Order Detail Screen, Instruction

Fields	
Instruction Type	Any instruction types, such as Gift, Pick, or Pack, attached to the template order. This field can be modified.
Text	The details of the special instruction attached to the template order. This field can be modified.

Table 5–7 Template Order Detail Screen, Ship To



View Icons	
	Address Details - Choose this icon to view or modify the ShipTo addresses. For more information on the screen that is displayed see the Organization Address Details screen.
The name and address of the person or organization where the order is shipped.	

Table 5–8 Template Order Detail Screen, Bill To

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

5.5 Order Payment Information

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

For template order header field descriptions, refer to the [Template Order Detail Screen, Template Order](#) table for details.

Table 5–9 Order Payment Information Screen, Payment Information

Actions	
Add Payment Type	This action takes you to the Add Order Payment Information screen.
Fields	
Payment Rule	The payment rule used for invoicing, settlement, and collection. For more information about payment rules, see the <i>Sterling Distributed Order Management Configuration Guide</i> .

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 5–10 Order Payment Screen, Credit Card


View Icons	
Actions	
	Address Details - Choose this icon to view the Bill To Address. For more information about the screen that is displayed, see the Organization Address Details 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 5–10 Order Payment Screen, Credit Card

Charge Sequence	<p>When multiple payment types are specified, Charge Sequence specifies the default payment type.</p> <p>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.</p> <p>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.</p>
Credit Card #	<p>The credit card number.</p> <p>Note: If encryption is turned on, credit card numbers are displayed with asterisks (*) for the first 12 digits, unless you have permissions to view decrypted primary payment attributes.</p>
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.
Expiration Date	The expiration date on the credit card.
Max Charge Limit	The maximum amount this payment type can be charged.
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.

If the payment type displayed is in the customer account payment type group the following fields are defined:

Table 5–11 Order Payment Screen, Customer Account

Actions	
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 or Check.

Table 5–11 Order Payment Screen, Customer Account

Charge Sequence	<p>When multiple payment types are specified, Charge Sequence specifies the default payment type.</p> <p>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.</p> <p>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.</p>
Customer Account #	<p>The Buyer's account number.</p> <p>If encryption is turned on, this field only displays the last four digits of the credit card number if you do not have the necessary permissions.</p>
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	The maximum amount this payment type can be charged.
Payment Reference #1	<p>This field can be customized as needed.</p> <p>If encryption is turned on, this field only displays the last four digits of the credit card number if you do not have the necessary permissions.</p>
Payment Reference #2	This field can be customized as needed.

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

Table 5–12 Order Payment Screen, Stored Value Card

Actions	
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.

Table 5–12 Order Payment Screen, Stored Value Card

Fields	
Payment Type	The payment type, for example, gift card.
Stored Value Card #	<p>The stored value card number.</p> <p>Note: If encryption is turned on, SVC numbers displayed with asterisks (*) for all but the last four digits, unless you have permissions to view decrypted primary payment attributes.</p>
Charge Sequence	<p>When multiple payment types are specified, Charge Sequence specifies the default payment type.</p> <p>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.</p> <p>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.</p>
Payment Reference #1	<p>This field can be customized as needed.</p> <p>Note: If encryption is turned on, this Payment Reference is displayed with asterisks (*) for all but the last 4 characters, unless you have permissions to view decrypted primary payment attributes.</p>
Unlimited Charges	<p>Select Unlimited Charges if the payment type has no charge limit.</p> <p>This field will not be displayed if the ChargeUpToAvailable flag has been enabled in the Configurator.</p>
Payment Reference #2	This field can be customized as needed.
Max Charge Limit	The maximum amount this payment type can be charged.
Payment Reference #3	This field can be customized as needed.
Funds Available	Amount of funds available on this card. This field will display 'Not Applicable' if the query to get available funds has been disabled.

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

Table 5–13 Order Payment Screen, Other

Actions	
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, Check.
Charge Sequence	<p>When multiple payment types are specified, Charge Sequence specifies the default payment type.</p> <p>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.</p> <p>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.</p>
Payment Reference #1	<p>This field can be customized as needed.</p> <p>Note: If encryption is turned on, this Payment Reference is displayed with asterisks (*) for all but the last 4 characters, unless you have permissions to view decrypted primary payment attributes.</p>
Payment Reference #2	This field can be customized as needed.
Max Charge Limit	The maximum amount this payment type can be charged.
Payment Reference #3	This field can be customized as needed.

5.6 Add Order Payment Information

You can add additional payment types to a template order.

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

Table 5–14 Add Order Payment Information Screen, Credit Card Payment Type

Fields	
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Credit Card #	Enter the credit card number.
Unlimited Charges	Select the Unlimited Charges if the payment type has no charge limit.
Expiration Date	Enter the expiration date on the credit card.
Max Charge Limit	Enter the maximum amount that can be collected against this payment type.
Credit Card Type	Enter the type of credit card, such as VISA or MasterCard.
Name On Card	Enter the name exactly as it appears on the card.

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

Table 5–15 Add Order Payment Information Screen, Customer Account Payment Type

Fields	
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Customer Account #	The Buyer's account number.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit.

Table 5–15 Add Order Payment Information Screen, Customer Account 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.
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 5–16 Add Order Payment Information Screen, Check or Other Payment Type

Fields	
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Payment Reference #1	This field can be customized as needed.
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 5–17 Add Order Payment Information Screen, Stored Value Card Payment Type

Fields	
Charge Sequence	When multiple payment types are specified, Charge Sequence specifies the default payment type. For example, if a Buyer uses a gift certificate and a credit card, by specifying the Charge Sequence of gift certificates as 1 and credits cards as 2, you can collect against any gift certificates before the credit card is collected against.
Unlimited Charges	Select Unlimited Charges if the payment type has no charge limit. This field will not be displayed if the ChargeUpToAvailable flag has been enabled in the Configurator.
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 is populated with the added payment types.

5.7 Copying Attributes from Parent Line to Chained Line

Attributes in the template are propagated from parent line to chained line. These attributes are always kept in synch between the parent and chained line. These attributes should not be passed as override while creating a chained line. If the new line has the scehdule element, then the scehdules are not copied. Otherwise they are always copied from parent to child regardless of the template.

Item attributes (ItemId, ProductClass, UnitOfMeasure) can be overridden in the chained line only when the inventory is not maintained by the buyer organization and by the seller organization. The logic to copy

OrderLineInvAttRequest, KitLine will still be based on the template. Schedules will be copied if they are not passed.

This template is almost the same as the drop ship chain order template. The only difference is KitCode, ItemId, ProductClass, UnitOfMeasure, ItemGroupCode and element OrderLineInvAttRequest are not mandatory and can be removed from the template if required.

5.8 Copying Attributes from Chained Line to Parent Line

There may be instances when certain attributes need to be copied from the chained line to the parent line. This will be done based on the template ChainedOrderUpwardPropagationTemplate of the chained order document type.

If multiple children exist, all of them will try to propagate the attribute changes to the parent. This will result in the last change on any child overriding any change done by any other children. Remove all the attributes from the template to prevent the propagation. Only extended attributes can be propagated upwards.

5.9 More Template Order Attributes

You can view additional order identification, shipping, and financial information related to the template order.

For template order header field descriptions, refer to the [Template Order Detail Screen](#), [Template Order](#) table for details.

Table 5–18 More Template Order Attributes Screen, Identification

Fields	
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 5–18 More Template Order Attributes Screen, Identification

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 <i>Sterling Distributed Order Management Configuration Guide</i> .
Currency	The monetary currency used for the order.
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 5–19 More Template Order Attributes Screen, Shipping

Fields	
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 5–20 More Template Order Attributes Screen, Financials

Fields	
Terms Code	The terms code.
Price Program	The price program used for order pricing.

Table 5–20 More Template Order Attributes Screen, Financials

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 5–21 More Template Order, Other Attributes


Fields	
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.

5.10 More Order Addresses

You can view any additional addresses as needed that pertain to a template order as per your business practices. For information on defining additional address types, refer to the *Sterling Distributed Order Management Configuration Guide*.

For template order header field descriptions, refer to the [Template Order Detail Screen, Template Order](#) table for details.

Table 5–22 More Order Addresses Screen, Forward To

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

5.11 Template Order Audits

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

For template order header field descriptions, refer to the [Template Order Detail Screen, Template Order](#) table for details.

Table 5–23 Template Order Audits Screen, Audits

Action	
View Details	This action takes you to the Template Order Audit Details screen for the selected audits.
Fields	

Table 5–23 Template Order Audits Screen, Audits

Audit #	The audit identification number. Click on the Expand All button, the audit details for each audit are expanded. If you click on the Collapse All button, the audit details for each audit are collapsed.	
	Detail #	The audit details identification number. Click this link to go to the Template Order Audit Details screen.
	Order Line Related Info	Any information related to order lines impacted by the modification, including: <ul style="list-style-type: none"> • 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 Details Screen.
	Modification Level	The level of modification for the corresponding audit detail such as header or line.
	Modification Type	The type of modification, such as change payment status or change carrier, for the corresponding audit detail.
Date	The date and time the modification was carried out.	
Modified By	The user that performed the modification.	
Reason	The reason the modification occurred and any additional information explaining the modification entered by the user.	
Modification Levels	A comma separated list of all levels of modification for the audit.	
Modification Types	A list of the types of modifications for the audit. There is a maximum of three items shown with an ellipsis on the third line if there are more items.	

5.12 Template Order Audit Details

You can view a template order audit's details.

Table 5–24 Order Audit Details Screen, Order Audit

Fields	
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 itemID'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 5–25 Order Audit Details Screen, Order Audit Details

Fields	
Audit Type	The type of audit performed.
Identifier	The audit identifier.
Name	The attribute that was modified.

Table 5–25 Order Audit Details Screen, Order Audit Details

Old Value	The value of the modified attribute prior to modification.
New Value	The value of the modified attribute after modification.

5.13 Organization Address Details

Table 5–26 Address Details

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

Lookup Screens

Many fields throughout the Application Consoles have a lookup icon that can be used to find additional records as they pertain to that field. For example, on the Inventory Items window, the Item ID field have lookup icons that you can use to locate the applicable item ID to populate the field.

6.1 Address Lookup

When you click on the lookup icon next to an address panel on any screen, the Address search window displays. Enter the desired search criteria in the search fields as with any other search. Note that the search criteria entered for address lookups is not case sensitive.

Table 6–1 Address Lookup

Fields	
First Name	The first name of the contact at this address.
Last Name	The last name of the contact at this address.
E-Mail	The e-mail address for the contact at this address.
Address Line 1	The first line of the street address.
Address Line 2	The second line of the street address.
City	The city or town in which the street is located.
State	The state or providence in which the city or town is located.
Postal Code	The postal code for the city or town.

Table 6–1 Address Lookup

Fields	
Country	The country in which the state or province is located.
Max Records	The maximum number of records the search will find.

Note: It is recommended that you do not use spaces before or after any text you enter in the search fields, as this may result in inconsistent or inaccurate results.

6.2 Address List

The Address List window displays the results of an address lookup search. You can populate the corresponding Address panel by the selecting the checkmark of the applicable address.

The Address List window displays the results of an address lookup search. You can populate the corresponding Address panel by the selecting the checkmark of the applicable address.

Table 6–2 Address List

Fields	
First Name	The first name of the contact at this address.
Last Name	The last name of the contact at this address.
E-Mail	The e-mail address for the contact at this address.
Address Line 1	The first line of the street address.
Address Line 2	The second line of the street address.
City	The city or town in which the street is located.
State	The state or providence in which the city or town is located.

6.3 Item Lookup

When you click on the lookup icon next to an Item ID field on any screen, the Items search window displays. Enter the desired search criteria in the search fields as you do with any other search.

You can change the view on this dialog to Catalog so that you can search the Catalog by all attributes. See [Catalog Item Lookup](#).

Table 6–3 Item Lookup

Fields	
Organization	The organization the item belongs to.
Item ID	The item ID.
Default PC	The item's product class.
UOM	The item's unit of measure.
Short Description	A brief description of the item.
Master Catalog ID	The item's ID in the catalog it belongs to.
GTIN	The global trade identification number.
Max Records	The maximum number of records the search will find.

6.4 Item List

The Item List window displays the results of an item lookup search. You can populate the Item ID field by the selecting the checkmark of the applicable item. Refer to the [Item List](#) table for assistance.

Table 6–4 Item List

Fields	
Item ID	The item ID.
Default PC	The item's product class.
UOM	The item's unit of measure.
Short Description	A brief description of the item.
Master Catalog ID	The item's ID in the catalog it belongs to.
Catalog Organization	The organization that owns the catalog containing the item.

6.5 Order Lookup

When you click on the lookup icon next to the Order # field, the Order search window displays. Entered the desired search criteria in the search fields as with any other search.

Table 6–5 Order Lookup

Fields	
Document Type	Select the type of order.
Enterprise	Enter the enterprise the work order belongs to or select Across Enterprises to search for all orders.
Order #	The order number.
Buyer	The buyer associated with the order.
Seller	The seller associated with the order.
Exchange Order with Type	Select the type to exchange with the order.
Buyer Account #	The buyer account number.
Order Line Status	Change the order line status.
Payment Status	Select the payment status.
Held Orders With Hold Type	Select held orders with a specific hold type.
Order State	Select the state of the order.
Max Records	The maximum number of records the search will find.

6.6 Order List

The Order List window displays the results of an order lookup search. You can populate the corresponding organization field by selecting the checkmark of the applicable order.

Table 6–6 Order List

Fields	
Order #	The order number.
Status	The stature of the order.
Enterprise	The enterprise associated with the order.

Table 6–6 Order List

Fields	
Buyer	The buyer of the order.
Order Date	the date the order was created.
Total Amount	The total amount of the order.

6.7 Order List Lookup

The Order List search screen appears when you add an order line from a return detail, return release or return shipment screens.

Table 6–7 Item List

Fields	
Order #	The order number. Click this hyperlink to view the order details.
Status	The status of the order.
Enterprise	The enterprise associated with the order.
Buyer	The buyer associated with the order.
Order Date	The date the order is placed.
Total Amount	The amount of the order.

This screen has different actions based on the parent screen. For example, if you are adding an order line from the return detail screen, the actions for this list lookup screen are **Select For Return** and **Restore and Select**. You should select the order number you wish to add to the return order and click either of these options.

6.8 Inbound Order Lookup

When you click on the lookup icon next to the PO # field, the Inbound Order search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–8 Inbound Order Lookup

Fields	
Document Type	Select the type of inbound order.
Enterprise	Enter the enterprise the inbound order belongs to or select Across Enterprises to search for all inbound orders.
PO #	The inbound order number.
Buyer	The buyer associated with the inbound order.
Seller	The seller associated with the inbound order.
Buyer Account #	The buyer account number.
Order Line Status	The status of the order line.
Held Orders With Hold Type	Select held orders with a specific hold type.
Order State	Select the state of the inbound order.
Max Records	The maximum number of records the search will find.

6.9 Inbound Order List

The Inbound Order List window displays the results of an inbound order lookup search. You can populate the corresponding organization field by selecting the checkmark of the applicable inbound order.

Table 6–9 Inbound Order List

Fields	
PO #	The purchase order number.
Status	The status of the inbound order.
Enterprise	The enterprise associated with the inbound order.
Buyer	The buyer of the inbound order.
Seller	The seller of the inbound order.
Order Date	The date the inbound order was created.
Total Amount	The total amount of the inbound order.

6.10 Return Lookup

When you click on the lookup icon next to the Return field, the Return search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–10 Return Lookup

Fields	
Document Type	The type of document.
Enterprise	Enter the enterprise the return belongs to or select Across Enterprises to search for all returns.
Return #	The return number.
Order #	The order order number of the return.
Return Date	The date range the return will arrive.
Buyer	The buyer of the return.
Seller	The seller of the return.
Return Line Status	The line status of the return.
Held Returns With Hold Type	Select held returns with a specific hold type.
Return Order Status	Select the state of the return.
Max Records	The maximum number of records the search will find.

6.11 Return List

The Return List window displays the results of a return lookup search. You can populate the corresponding organization field by selecting the checkmark of the applicable return.

Table 6–11 Return List

Fields	
Return #	The return number.
Status	The status of the return.
Enterprise	The enterprise associated with the return.
Buyer	The buyer of the return.

Table 6–11 Return List

Fields	
Return Datet	The seller of the return.
Total Amount	The total amount of the return.

6.12 Order Line Lookup

When you click on the lookup icon next to the Line # field, the Order Line search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–12 Order Line Lookup

Fields	
Document Type	The type of document.
Enterprise	Enter the enterprise the work order belongs to or select Across Enterprises to search for all work orders.
Order #	The order number.
Buyer	The buyer associated with the order line.
Seller	The seller associated with the order line.
Item ID	The item ID associated with the order line.
Product Class	The item's product class.
UOM	The item's unit of measure.
Item Description	A description of the item.
Customer Item ID	The customer's item ID.
Customer PO#	The customer's purchase order number.
Max Records	The maximum number of records the search will find.

Note: The search will only return order lines of the specified order that are in released status (or another status that was configured to be allowed to be included into a shipment).

6.13 Order Line List

The Order Line List window displays the results of an order line lookup search. You can populate the corresponding organization field by selecting the checkmark of the applicable order line.

Table 6–13 Order Line List

Fields	
Order #	The order number.
Line #	The line number.
Item ID	The item ID.
PC	The product class of the item.
UOM	The unit of measure of the item.
Item Description	A description of the item.
Recv	The receiving node of the item.
Ship Node	The shipping node of the item.
Ship Date	The shipping date of the item.
Line Qty	The line quantity of the item.
Amount	The total amount of the item.
Status	The status of the item.

6.14 User Lookup

When you click on the lookup icon next to the Assign To User field, the following popup dialog displays. From this lookup dialog you can search for users. Enter the desired search criteria in the search fields as with any other search.

Table 6–14 User Lookup

Fields	
User ID	The user ID.
User Name	The user name.
Only Logged In Users	Search for users who are logged in.
Max Records	The maximum number of records the search will find.

6.15 Catalog Item Lookup

When you click on the lookup icon next to an Item ID field on any screen, you can switch from Item ID to Catalog Item so that you can search Catalog by all attributes. Enter the desired search criteria in the search fields as you do with any other search.

Table 6–15 Catalog Item Lookup

Fields	
Organization	The name of the organization.
Category ID	The category ID.
Description	A description of the item.
Max Records	The maximum number of records the search will find.

6.16 Catalog Item List

The Catalog List window displays the results of a Catalog Item lookup search. Refer to the [Catalog Item List](#) table for assistance.

Table 6–16 Catalog Item List

Fields	
Organization Code	The organization code.
Category ID	The name of the organization.
Description	The city the organization is located in.

6.17 Buyer, Seller, or Enterprise Organization Lookup

When you click on the lookup icon next to a Buyer or Seller field on any screen, the Organization search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–17 Buyer, Seller, or Enterprise Lookup

Fields	
Organization	The type of organization.
Vendor ID	The vendor ID
Organization Name	The name of the organization.
Roles	The role of the organization.
Max Records	The maximum number of records the search will find.

6.18 Buyer, Seller, or Enterprise Organization List

The Organization List window displays the results of an organization lookup search. You can populate the corresponding organization field by the selecting the checkmark of the applicable organization. Refer to the [Buyer, Seller, or Enterprise Organization List](#) table for assistance.

Table 6–18 Buyer, Seller, or Enterprise Organization List

Fields	
Organization Code	The organization code.
Organization Name	The name of the organization.
City	The city the organization is located in.

6.19 Node Lookup

When you click on the lookup icon next to a Node field on any screen, the Node search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–19 Node Lookup

Fields	
Participates in Enterprise	The participates in the enterprise.
Node	The name of the node.
GLN	The global location number.
Parent Organization	The parent organization of the node.
Identified By Parent As	How the node is identified by the parent organization.
Description	A description of the node.
City	The city or town in which the node is located.
State	The state or providence in which the city or town is located.
Postal Code	The postal code for the city or town.
Max Records	The maximum number of records the search will find.

6.20 Node List

The Node List window displays the results of a node lookup search. You can populate the corresponding node field by the selecting the checkmark of the applicable node. Refer to the [Node List](#) table for assistance.

Table 6–20 Node List

Fields	
Node	The name of the node.
Description	A brief description of the node.
Owned By	The organization that owns the node.
Interface Type	The system the node uses to interface with the Sterling Supply Chain Applications. For example YFX Portal or another third-party system.
Active	Indicates if the node is active.

6.21 Location Lookup

When you click on the lookup icon next to a Location field on any screen, the Location search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–21 Location Lookup

Fields	
Node	Select the node you are searching for.
Location	The location of the node.
Zone	The zone the location is located in.
Max Records	The maximum number of records the search will find.

6.22 Location List

The Location List window displays the results of a location lookup search. You can populate the corresponding location field by the selecting the checkmark of the applicable location. Refer to the [Location List](#) table for assistance.

Table 6–22 Location List

Fields	
Location	The name of the location.
Zone	The zone associated with the location.
Location Type	The type of the location.
Location Size Code	The location size code.
Aisle #	The aisle number.
Bay #	The bay number.
Level #	The level number.

6.23 Zone Lookup

When you click on the lookup icon next to a Zone field on any screen, the Zone search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–23 Zone Lookup

Fields	
Node	The name of the node.
Zone	The type of zone you are searching for.
Max Records	The maximum number of records the search will find.

6.24 Zone List

The Zone List window displays the results of a zone lookup search. You can populate the corresponding location field by selecting the checkmark of the applicable zone. Refer to the [Zone List](#) table for assistance.

Table 6–24 Zone List

Fields	
Zone	The name of the zone.
Description	A brief description of the zone.
Building_Number	Building number associated with the zone.
Forward Pick Zone	The area within a zone where picking tasks take place.

6.25 Receipt Lookup

When you click on the lookup icon next to a Receipt # field on any screen, the Receipt search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–25 Receipt Lookup

Fields	
Document Type	The document type.
Enterprise	Enter the enterprise the receipt belongs to or select Across Enterprises to search for all receipt.
Receiving Node	The receiving node.
Receiving Dock	The receiving dock.
Receipt #	The receipt number.

Table 6–25 Receipt Lookup

Fields	
Buyer	The buyer of the receipt.
Seller	The seller of the receipt.
Order #	The order number.
Shipment #	The shipment number.
Receipt Date	The date of the receipt.
Receipt Status	The status of the receipt.
Max Records	The maximum number of records the search will find.

6.26 Receipt List

The Receipt List window displays the results of a Receipt# lookup search. You can populate the corresponding receipt# field by the selecting the checkmark of the applicable receipt. Refer to the [Receipt List](#) table for assistance.

Table 6–26 Receipt List

Fields	
Receipt #	Receipt number associated with the receipt.
Shipment #	Shipment number associated with the receipt.
Order #	Order Number associated with receipt.
Enterprise	Enterprise associated with the receipt.
Buyer	Buyer associated with the receipt.
Seller	Seller associated with the receipt
Receipt Start Date	The start date of the receipt.
Receiving Node	The node where inventory was received.
Receipt Status	Status of the receipt.

6.27 Productivity Type Lookup

When you click on the lookup icon next to a Productivity Type field on any screen, the Productivity Type search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–27 Productivity Type Lookup

Fields	
Node	Select the node you are searching for.
Productivity Type	The productivity type.
Description	A description of the productivity type.
Capture Trip Level Metrics	Select to capture trip level metrics
Max Records	The maximum number of records the search will find.

6.28 Productivity List

The Productivity Type List window displays the results of a Productivity Type lookup search. You can populate the corresponding productivity type field by the selecting the checkmark of the applicable productivity type. Refer to the [Productivity Type List](#) table for assistance.

Table 6–28 Productivity Type List

Fields	
Node	The node associated with the productivity type.
Productivity Type	Productivity type associated with the productivity.
Description	Description of productivity type.
Trip Level Matrics	Indicates the status of the trip level capture.

6.29 Countries Lookup

When you click on the lookup icon next to a Country Of Origin field on any screen, the Container search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–29

Field	
Country Of Origin	Enter the name or part of the name of the country you would like to search for.
Max Records	The maximum number of records the search will find.

6.30 Country List

The Country List window displays the results of a Country Of Origin lookup search. You can populate the corresponding Country Of Origin field by the selecting the checkmark of the applicable country. Refer to the [Country List](#) table for assistance.

Table 6–30 Country List

Fields	
Country	The name of the country.
Country Code	The country code.
Organization Code	The organization code associated with the country.

6.31 Shipment Lookup

When you click on the lookup icon next to a Shipment # field on any screen, the Shipment search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–31 Shipment Lookup

Fields	
Shipment #	The shipment number.
Status	The status of the shipment.
Buyer	The buyer of the shipment.

Table 6–31 Shipment Lookup

Fields	
Service	The type of service of the shipment.
Expected Ship Date	The expected date the shipment will be sent out.
Origin	Where the shipment originates from.
Destination	The destination of the shipment.
Total Weight	The total weight of the shipment.
Total Volume	The total volume of the shipment.
Tag/Serial Requested	Whether a tag or serial is requested.

6.32 Shipment List

The Shipment List window displays the results of a shipment # lookup search. You can populate the corresponding shipment # field by the selecting the checkmark of the applicable shipment. Refer to the [Shipment List](#) table for assistance.

Table 6–32 Shipment List

Fields	
Shipment #	The shipment number.
Ship Node	The node the shipment ships from.
Receiving Node	The node the shipment ships to.
Order Number	Order number associated with the shipment.
Ship Date	The date the shipment is to ship on.
Buyer Organization Code	The Buyer ID
Seller Organization Code	The Seller ID
Status	The shipment status.

6.33 Adjustment Reason Code Lookup

When you click on the lookup icon next to a Reason Code field on any screen, the Adjustment Reason Code search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–33

Fields	
Node	The node associated with the adjustment reason.
Enterprise	The enterprise requesting the adjustment.
Adjustment Reason Code	The code for the reason of the adjustment.
Description	Description of the Adjustment Reason.
Host Adjustment Reason Code	The code for the the reason of the host adjustment.
Max Records	The maximum number of records the search will find.

6.34 Adjustment Reason Code List

The Adjustment Reason Code List window displays the results of a reason code lookup search. You can populate the corresponding reason code field by the selecting the checkmark of the applicable reason code. Refer to the [Adjustment Reason Code List](#) table for assistance.

Table 6–34 Adjustment Reason Code List

Fields	
Adjustment Reason Code	The reason code for inventory.
Description	The description for the adjustment reason code.
Accounting Bin Location ID	The accounting bin location for the inventory associated with the reason code.

6.35 Wave Lookup

When you click on the lookup icon next to Wave # field on any screen, the Wave search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–35 Wave Lookup

Fields	
Node	Select the node you want to search for waves in.
Shipment#	Enter the shipment number of the shipment that belongs to the wave you are searching for, if applicable.
Wave #	Enter the wave number of the wave you are searching for, if applicable.
Wave Status	Select the status of the waves you are searching for.
Shipment Group	Enter the shipment group that the waves you are searching belong to.
Release No Earlier Than	Enter the Release No Earlier Than date range that you want to search for waves in. Only waves with a Release No Earlier Than date that falls within the range you specify considered.
Release No Later Than	Enter the Release No Later Than date range that you want to search for waves in. Only waves with a Release No Later Than date that falls within the range you specify considered.
Max Records	Enter the maximum number of waves you want returned from your search.

6.36 Wave List

The Wave List window displays the results of a wave number lookup search. You can populate the corresponding wave number by selecting the check box of the applicable wave number. Refer to the [Wave List](#) table for assistance.

Table 6–36 Wave List

Fields	
Wave #	The wave number.
Shipment Group	The shipment group that the wave belongs to.
Status	The status of the wave is in.
Sequence #	The sequence number associated with the wave.

Table 6–36 Wave List

Fields	
Release No Earlier Than	The wave is not released for picking before this date.
Release No Later Than	The wave is not release for picking after this date.

6.37 Count Request Lookup

When you click on the lookup icon next to the Count Request # field on any screen, the Count Request search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–37 Count request Lookup

Fields	
Enterprise	The Enterprise requesting the count.
Node	The node the count is requested from.
Request type	The type of request.
Count Request #	The count request number.
Request Name	The name of the request.
Item ID	The item ID.
PC	The item's pproduct class.
UOM	The item's unit of measure.
Status	The status of the count request.
Max Records	The maximum number of records the search will find.

6.38 Count Request List

The Count Request List window displays the results of a count request number lookup search. You can populate the corresponding count request number field by the selecting the checkmark of the applicable count request number. Refer to the [Count Request List](#) table for assistance.

Table 6–38 Count Request List

Fields	
Count Request #	The count request number associated with the count request. Click this link to view count request details.
Count Program Name	The count program name associated with the automatic cycle count request.
Location	The location identifier.
Enterprise	The enterprise associated with the count request.
Item ID	The Item ID associated with the count request.
Description	The item's description.
Priority	The count request priority.
Start No Earlier Than	The date and time after which the count task will be suggested.
Requesting User ID	The user for whom the count request is placed.
Status	The count request status.

6.39 Category Details

You can perform a search and view category details from any search that contains an Item ID lookup icon.

Table 6–39 Category Details Screen, Category Detail

Fields	
Category ID	The category ID.
Description	A brief description of the category.
Category Path	The path to the selected category.

Table 6–40 Category Details Screen, Sub Categories

Fields	
Category ID	Any category that is under the selected category. Choose the link to switch to this category.

Table 6–40 Category Details Screen, Sub Categories

Fields	
Description	A brief description of the sub-category.
Category Path	The path to the sub-category.

Table 6–41 Category Details Screen, Category Items

Fields	
Item ID	The items in this category.
PC	The item's product class.
UOM	The item's unit of measurement.
Description	A brief description of the item.

6.40 Category List

The Category List window displays the results of a category lookup search. You can populate the Category field by selecting the checkmark of the applicable category. Refer to the [Category List](#) table for assistance.

Table 6–42 Category List

Fields	
Category ID	The category ID.
Description	A brief description of the category.
Category Path	The category's path in the catalog.
Catalog Organization	The organization that owns the catalog containing the category.

6.41 Region Lookup

When you click on the lookup icon next to the Region field on any screen, the Region search window displays. Enter the desired search criteria in the search fields as with any other search.

6.42 Region List

The Region List window displays the results of a region lookup search. You can populate the region field by the selecting the checkmark of the applicable region. Refer to the [Region List](#) table for assistance.

Table 6–43 *Region List*

Fields	
Region	The name of the region.
Region Level	The level of the region. Typical values are Country, State, City.
Parent Region	The name of the parent region that the region belongs.
Country	The name of the country that the region belongs.

6.43 Region Details

You can perform a search and view region details from any search containing a Region lookup icon.

Table 6–44 *Region Details Screen, Region Detail*

Fields	
Region	The name of the region.
Region Level	The level of the region. Typical values are Country, State, City.
Country	The name of the country that the region belongs.
Parent Region	The name of the parent region that the region belongs.
Parent Region Level	The level of the parent region. Typical values are Country, State, City.
Region Schema	The region schema that the region belongs.

Table 6–45 Region Details Screen, Sub Regions

Fields	
Region	The name of the region.
Region Level	The level of the region. Typical values are Country, State, City.
Parent Region	The level of the parent region. Typical values are Country, State, City.
Country	The name of the country that the region belongs.

6.44 Item Classification Lookup

When you click on the lookup icon next to an Item Classification field on any screen, the Item Classification search window displays. Enter the desired search criteria in the search fields as with any other search.

Table 6–46

Fields	
Organization	The type of organization.
Classification ID	The ID for the classification.
Description	Description of the Item Classification.
Max Records	The maximum number of records the search will find.

6.45 Item Classification List

The Item Classification List window displays the results of a item classification lookup search. You can populate the item classification field by the selecting the checkmark of the applicable item classification. Refer to the [Classification List](#) table for assistance.

Table 6–47 Classification List

Fields	
Classification Id	The classification Id.
Description	A brief description of the classification.

Table 6–47 Classification List

Fields	
Classification Path	The path to the selected classification.
Catalog Organization	The organization that owns the catalog containing the classification.

6.46 Item Classification Details

You can perform a search and view item classification details from any search containing a item classification lookup icon.

Table 6–48 Classification Details Screen, Classification Detail

Fields	
Classification Id	The classification ID.
Description	A brief description of the classification.
Classification Path	The path to the selected classification.

Table 6–49 Classification Details Screen, Sub Classifications

Fields	
Classification Id	Any classification that is under the selected classification. Choose the link to switch to this classification.
Description	A brief description of the sub-classification.
Classification Path	The path to the sub-classification.

Table 6–50 Classification Details Screen, Classification Items

Fields	
Item Id	The items in this classification.
Default PC	The item's product class.
UOM	The item's unit of measurement.
Description	A brief description of the item.

6.47 Work Order Lookup

When you click on the lookup icon next to Work Order # field on any screen, the Work Order search window displays. Enter the desired search criteria in the search fields as with any other search.


Table 6–51 Work Order Lookup

Fields	
Node	Enter the node the work order belongs to or select Across Nodes to search for all work orders.
Enterprise	Enter the enterprise the work order belongs to or select Across Enterprises to search for all work orders.
Work Order#	The work order number associated with the work order..
Order#	The order number associated with the work order.
Work Order Status	Change the status of a work order.
Appointment Date Range	Set the appointment range by date and time.
Pre-call Status	The pre-call status of the work order.
Open Work Orders Only	Select to search for Open Work Orders only.
Held Work Orders With Hold Type	Select to search for Work Orders with a Hold Type.
Resource Pool ID	The resource pool ID.
Service Complexity Level	Select either simple or complex for the Service Complexity Level.
Max Records	The maximum number of records the search will find.

6.48 Work Order List

The Work Order List window displays the results of a work order # lookup search. You can populate the work order # field by the selecting the checkmark of the applicable work order #. Refer to the [Work Order List](#) table for assistance.

Table 6–52 Work Order List

Fields	
Work Order #	The work order number associated with the work order. Click this link to view the work order details.
Enterprise	The Enterprise associated with the work order.
Service Item Group	The service item group associated with the work order.
Item ID	The Item ID of the item associated with the work order.
Unit Of Measure	The UOM code of the item associated with the work order.
Priority	The work order priority.
Segment Type	Segment type of the item. A segment type indicates an inventory category. Typical values are MTC - Made To Customer or MTO - Made to Order.
Segment #	Segment number of the item. A segment holds either the specific buyer or specific order number that requires dedication.
Status	<p>The work order status.</p> <p>This  icon appears only if the work order is put on hold.</p>

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