Sterling Supply Chain Visibility

Customer Administration Guide

Documentation Date: 23 January 2014

Note

Before using this information and the product it supports, read the information in "Notices" on page 151.

This edition applies to the 25 September 2011 release of IBM Sterling Supply Chain Visibility and to all subsequent releases and modifications until otherwise indicated in new editions.

Contents

Chapter 1. Introduction to Supply Chain Visibility

IBM® Sterling Supply Chain Visibility is an as-a-service application that provides a comprehensive view into the supply chain order-to-cash and procurement-to-payment processes.

Sterling Supply Chain Visibility provides the following features:
- The application instantly displays and summarizes supply chain information from all electronic trading partners and communities through a single dashboard.
- It presents a single web interface that allows users to manage and control the business processes, including documents such as purchase orders, shipping acknowledgements, invoices, and other transactions.
- It alerts users to events that disrupt information and material flow in the supply chain.

Sterling Supply Chain Visibility can be used by buyer organizations (inbound customers) and seller organizations (outbound suppliers):
- Buyer organizations can use Sterling Supply Chain Visibility for inbound visibility and to analyze and compare their suppliers' performance.
- Supplier organizations can use the application for outbound visibility and to analyze and compare their customer service levels.
- Both buyer and seller organizations can use the application to view and manage alerts that are raised when there are supply chain issues that need their attention.

Sterling Supply Chain Visibility provides the following capabilities:

Visibility

Provides a set of views to look up the status of an order, shipment, invoice, or payment. The application provides one-stop visibility to all relevant details of that order, shipment, or invoice.

Dashboards

The dashboard provides a comprehensive view of alerts, invoices, shipments, KPI charts, and orders. The dashboard can be used to analyze data and generate recommendations that drive strategy.

Inbound and Outbound Supply Monitoring

Alerts are generated when unplanned events occur. Customers and their suppliers can resolve these alerts to remove bottlenecks and streamline the supply chain process.

Key Performance Indicators (KPIs) and Reports

Buyers can generate KPIs and reports to analyze and compare supplier performance. Sellers can use these metrics to evaluate their own performance in delivering goods to their customers.

Integrated Platform

Offers an integrated platform across business-to-business (B2B) gateways and the Sterling Supply Chain Visibility platform to support various supply chain synchronization solutions.

Sterling Supply Chain Visibility provides EDI mapping capabilities, and provides visibility into the purchasing and purchase order collaboration process at a relatively low customer cost.

A Typical Supply Chain Process

A supply chain must be fully integrated to operate at maximum efficiency. In today's complex multiplatform enterprises, systems that can provide visibility and orchestrate workflows across disparate systems can be a significant force in driving business decisions.

A typical supply chain process follows these steps:

1. The buyer places an order and sends a purchase order (PO) to the supplier.
2. The supplier sends an acknowledgement to the buyer within a specified time period.
3. The supplier sends a commitment, which specifies when the shipment will be shipped, and the quantity and the items that will be shipped on that date.
4. The supplier sends an Advance Ship Notice (ASN) to the buyer.
5. The supplier sends the shipment.
6. The supplier creates an invoice and sends it to the buyer.

Sterling Supply Chain Visibility receives a copy of these transactions and others from carriers, transportation systems, and warehouse systems to provide a single source of visibility into the purchase order life cycle.

Subscription Types

There are several subscription types for Sterling Supply Chain Visibility.

When IBM sets up your buyer or seller organization during the on-boarding process, you will select a subscription type. The following subscription types are available to meet the needs of your business:

Inbound Visibility

This is the basic Sterling Supply Chain Visibility package for a buyer organization.

The Alerts feature and the optional Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal module are not included in this package.

Inbound Visibility with Alerts

This subscription type includes the Inbound Visibility package and the Alerts feature.

The optional Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal module is not included in the subscription.

Inbound Visibility, with Alerts and Compliance

This is the complete Sterling Supply Chain Visibility package for a buyer organization. Users can access the following modules:

- Inbound Visibility

- Alerts
- Vendor Compliance

Outbound Visibility with Alerts

This is the complete Sterling Supply Chain Visibility package for a seller organization. It includes the Outbound Visibility package and the Alerts feature.

All Inbound and Outbound

This is the complete Sterling Supply Chain Visibility package for a customer that functions as both a buyer user and a seller user. Users can access the following modules:

- Inbound Visibility with Alerts
- Outbound Visibility with Alerts
- Vendor Compliance

Supply Chain Visibility Alerts

Buyers and sellers can receive alerts to find out about orders or shipments that require prompt attention or contain potential issues.

An alert is a message that notifies the users about a transaction that might require manual intervention or manual review. Alerts are raised when specific events occur or when a defined alert condition is met.

In Sterling Supply Chain Visibility, *alerts* are also referred to as *events*. Both terms refer to an issue that is raised to report a discrepancy:

Events

Buyer and seller administrators configure events, which track the supply chain workflow.

For example, buyers can have the system check to make sure that their suppliers submit purchase order acknowledgements and commitments on time.

Alerts

When exceptions occur in the supply chain workflow, Sterling Supply Chain Visibility sends alerts to users.

Users can view the alert on the Sterling Supply Chain Visibility Dashboard or receive an email.

Administrators can also set up Sterling Supply Chain Visibility to generate an XML file for an alert. You can export these alert files to a third-party application.

Sterling Supply Chain Visibility supports the following types of events:

- You can subscribe to standard events and alerts.
- You can define custom events to measure specific conditions that help you run your business.
- A buyer can record manual events to track issues or discrepancies. For example, a buyer might want to record an issue with incorrect labelling on a shipment at one of the receiving locations.

Uploading Inventory Information

Sterling Supply Chain Visibility allows buyers and sellers to upload and work with current inventory information. Suppliers can upload the inventory data from another application.

If you are a supplier to an organization that is a buyer in Sterling Supply Chain Visibility, you have the following options for uploading inventory files:

- Upload the current inventory through Sterling Supplier Portal.
- Send an XML document to Sterling B2B Collaboration Network.

Buyers can use Sterling Supply Chain Visibility to view the uploaded inventory from their suppliers. Buyers can search for inventory details by item ID.

Buyers can also use inventory features in Sterling Supply Chain Visibility to look up inventory balances at their warehouses. The buyer can look for out-of-stock items and determine if a transfer order is needed.

Chapter 2. General Administration Tasks

Buyer and seller administrators can set up Sterling Supply Chain Visibility to meet the needs of their business.

Both buyers and sellers can configure the following capabilities in Sterling Supply Chain Visibility:

- User Profiles
- Order Flows
- EDI Identifiers
- User-Defined Fields
- Business Calendars
- Custom Events
- Reports
- Saved Searches

Buyer and seller administrators can configure additional capabilities for their organizations:

- Buyer Administration
- Seller Administration

Chapter 3. User Profiles

Buyer and seller administrators define a profile for each user, which controls the user's access to Sterling Supply Chain Visibility features.

Adding Users

Buyer and seller administrators can add a profile for each user and then define the user roles.

Procedure

To add a user profile, follow these steps:

1. Log in to Sterling Customer Center as a buyer or seller administrator.
2. Click **My Company** in the Administration section of the Customer Center home page. The Company Details page opens.
3. Click **Add User** to open the Add User page.
4. Define the user profile, such as the user name, address, and initial password.

   When you define the user's email address, Sterling Supply Chain Visibility uses that email account to send alerts to the user.
5. Set the **Role** to **Company Administrator** or **Company User**:
   - These roles control the user's access to Sterling Customer Center. The administrator can add and edit other users in Customer Center.
   - You will define the Sterling Supply Chain Visibility user roles in Step 11.
6. Click **Save** to create the user profile. The View User Details page is displayed.
7. Open the **Application Access** tab on the View User Details page.
8. Click **Add Application** to open the Add Application Access page.
9. Select **IBM Sterling Supply Chain Visibility** as the application.
10. Click **Next** to open the Edit Application Access page. By default, the **Status** for the user is set to **Active**.
11. Select the Sterling Supply Chain Visibility role, such as **User** or **Administrator**.
12. Click **Save** to complete the user's profile and return to the View User Details page.

What to do next

Buyer organizations can use the Sterling Business Intelligence application to develop advanced reports and run ad hoc queries. After you create the user profile for Sterling Supply Chain Visibility, you can set up the user to access Sterling Business Intelligence.

User Roles

Buyer and seller administrators can assign a role to each user. The role controls the features each user can access in Sterling Supply Chain Visibility.

Buyer User Roles

Buyer administrators can assign their users to the following roles:

User

Buyer users can manage inbound events, such as the shipments and invoices they receive from the seller. Buyer users can also view alerts and run reports.

Users cannot configure alerts and do not have access to the **Administration** menu.

Administrator

Buyer administrators can perform the following tasks:

- Use the **Administration** menu to manage their organization's Sterling Supply Chain Visibility workflow.
- Configure alert thresholds and tolerances.
- Configure reports.
- Use all the Sterling Supply Chain Visibility features that are available to their users.
- Configure IBM Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal, if the buyer subscribes to this optional module.

Supplier Relations Officer

Buyers can select this user role if they subscribe to the optional IBM Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal module.

The SRO user can define vendor compliance preferences, which control the processing of chargebacks. The user can also update supplier profiles and perform certain administrative tasks.

For more information, see "Supplier Relations Officer Role" on page 109.

Seller User Roles

Seller administrators can assign their users to the following roles:

User

Seller users can manage outbound events, such as the purchase orders they receive from the buyer. Seller users can also view alerts and run reports.

Seller users cannot configure alerts and do not have access to the **Administration** menu.

Administrator

Seller administrators can perform the following tasks:

- Use the **Administration** menu to manage their organization's Sterling Supply Chain Visibility workflow.
- Configure alert thresholds and tolerances.
- Use all the Sterling Supply Chain Visibility features that are available to their users.

Assigning Sterling Business Intelligence Users

Buyer administrators can assign users to access the Sterling Business Intelligence application.

Procedure

To assign a reporting user role to a user, follow these steps:

1. Log in to Sterling Customer Center as a buyer administrator.
2. Click **Manage Users** in the Administration section of the Customer Center home page. The Search User page is displayed.
3. Enter the user's email address and click **Submit** to search for the user.
4. Double-click the user's email address to open the View User Detail page.
5. Open the **Application Access** tab and click **Add Application**. The Add Application Access page is displayed.
6. Select **IBM Sterling Business Intelligence** as the application.
7. Click **Next** to open the Edit Application Access page. By default, the **Status** for the user is set to **Active**.
8. Select the reporting role, such as **Report Viewer**.
9. Click **Save** to save the new role and return to the View User Details page.

Sterling Business Intelligence User Roles

Buyer administrators can assign reporting roles to their users. The users can develop or run reports in the Sterling Business Intelligence application.

Buyer administrators can assign their users to the following reporting roles:

Report Viewer

Users can view and run the reports that were created by the report authors and ad hoc query authors in your organization.

As a best practice, assign the business users in your organization to the Report Viewer role.

Report Author

The user can develop complex reports in Cognos Report Studio and write ad hoc queries in Cognos Query Studio.

The user can also run reports in Sterling Business Intelligence.

Report authors are expected to have Cognos reporting skills and should be trained to use Report Studio.

Ad Hoc Query Author

The user can develop ad hoc queries in Cognos Query Studio.

The user can also run reports in Sterling Business Intelligence.

Chapter 4. Order Flows

Buyer and seller administrators can define order flows to control how the delivery status is tracked.

For example, you can define when a shipment is considered to be delivered. You can configure one of these options:

- The shipment is marked as delivered when the load status update shows that the freight has been delivered.
- The shipment is marked as delivered when the load status update shows that there has been any activity at the destination location.

Searching for Order Flow Types

Buyer and seller administrators can configure Order Flow Types and Shipment Flow Types.

Procedure

To configure an Order Flow Type, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator.
2. From the menu bar, buyers and sellers can select one of the following options:
   - Buyers can click **Administration > Manage Inbound Order Flows**.
   - Sellers can click **Administration > Manage Outbound Order Flows**.

   The Search Criteria panel is displayed on the Find Order Flow Type page.
3. Enter the following search criteria and click **Search**:

Table 1. Search Criteria for Find Order Flow Type Page

Field	Description
Order Flow Type	Enter the name of the order flow you are searching for.
Order Flow Description	Enter the description of the order flow you are searching for.

4. You can view the search results in theListing panel of the Find Order Flow Type page. For each record, the **Order Flow Type** and **Order Flow Description** are displayed.
5. You can perform the following actions to manage your order flow types:

Table 2. Actions for Find Order Flow Type Page

Action	Description
Add	Define a new Order Flow Type.
Modify	Modify the selected Order Flow Type.
Delete	Delete the selected Order Flow Type.

Adding an Order Flow Type

Buyer and seller administrators can add an Order Flow Type to Sterling Supply Chain Visibility.

Procedure

To add a new Order Flow Type, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator.
2. From the menu bar, select one these options:
   - Buyers can click **Administration > Manage Inbound Order Flows**.
   - Sellers can click **Administration > Manage Outbound Order Flows**.

   The Search Criteria panel is displayed on the Find Order Flow Type page.
3. Enter the search criteria and click **Search**. A list of order flows is displayed in the Listing panel of the Find Order Flow Type page.
4. Click **Add** to open the Add Order Flow Type page.
5. Define the following fields:

Table 3. Fields for Add Order Flow Type Page

Field	Description
Order Flow Type	Enter the name for the new Order Flow Type.
Order Flow Description	Enter a description for the new Order Flow Type.
Shipment is considered to be delivered when a load update	This option lets you validate the delivery of a shipment against a load update. Select one of these options: • **Indicates That Shipment Is Delivered**: Select this option to mark the shipment as delivered when the load update shows that the shipment is delivered. • **Indicates Activity In The Destination City**: Select this option to mark the shipment as delivered if the load update shows any activity in the delivery location.
Milestone Name	Enter the milestone name that you want to add to the new Order Flow Type.
Description	Enter a description for the milestone name.
Sequence No.	Each milestone in an Order Flow Type has a sequence number. Enter a sequence number that is between the sequence number of the previous and next standard milestones.
Order	Select the **Order** check box to add the milestone to the Order Flow Type.
Shipment	Select the **Shipment** check box to add the milestone to the Shipment Flow Type.

Table 3. Fields for Add Order Flow Type Page (continued)

Field	Description
Transport Status	Select the **Transport Status** check box to update the corresponding shipment milestone when a transport status update is received for the shipment. The **Transport Status** box is only enabled if the corresponding shipment level milestone is enabled.

6. You can perform the following actions to manage the milestones for the order flow type:

Table 4. Actions for Add Order Flow Type Page

Action	Description
Add	Define a new milestone for an Order Flow Type.
Delete	Delete a milestone.

7. Click **Save**.

Modifying an Order Flow Type

Buyer and seller administrators can update an Order Flow Type.

Procedure

To modify an Order Flow Type, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator.
2. From the menu bar, select one these options:
   - Buyers can click **Administration > Manage Inbound Order Flows**.
   - Sellers can click **Administration > Manage Outbound Order Flows**.

   The Search Criteria panel is displayed on the Find Order Flow Type page.
3. Enter the search criteria and click **Search**. A list of order flows is displayed in the Listing panel of the Find Order Flow Type page.
4. Select the check box for the Order Flow Type you want to change and click **Modify**. The Modify Order Flow Type page is displayed.
5. Update the applicable fields and milestones.

   Note: You cannot change the **Order Flow Type** field . Instead, you can delete this order flow and then add a new order flow to replace it.
6. Click **Save**.

Deleting an Order Flow Type

Buyer and seller administrators can delete an Order Flow Type.

Procedure

To delete an Order Flow Type, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator.

2. From the menu bar, select one these options:
   - Buyers can click **Administration > Manage Inbound Order Flows**.
   - Sellers can click **Administration > Manage Outbound Order Flows**.

   The Search Criteria panel is displayed on the Find Order Flow Type page.
3. Enter the search criteria and click **Search**. A list of order flows is displayed in the Listing panel of the Find Order Flow Type page.
4. Select the check box for the order flow type you want to remove and click **Delete**.

Chapter 5. EDI Identifiers

Sterling Supply Chain Visibility administrators can define EDI identifiers for the buyers and sellers they work with.

Both buyer and seller organizations can define EDI identifiers. For each EDI identifier, you define the following entries:

- A qualifier code that is used to designate the sender ID or receiver ID element for the supplier or customer
- An EDI identifier for the supplier or customer

Searching for EDI Identifiers

Sterling Supply Chain Visibility administrators can search for the EDI identifiers they set up for their buyers and sellers.

Procedure

To search for EDI identifiers, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator.
2. Click **Administration > Manage My EDI IDs**. The Add/Delete EDI IDs panel is displayed on the Manage My EDI IDs page.
3. Enter the following search criteria and click **Search**:

Table 5. Search Criteria for Manage My EDI IDs Page

Field	Description
Qualifier	Search for EDI identifiers using the qualifier. Enter the code that is used to designate the sender or receiver ID element.
EDI ID	Search for a specific EDI Identifer to find that buyer or seller organization.

4. You can perform the following actions to manage your EDI identifiers:

Table 6. Actions for Manage My EDI IDs Page

Action	Description
Add a Record	Create an EDI identifier.
Delete	Remove the selected EDI identifier.

Adding an EDI Identifier

Buyer and seller administrators can add an EDI identifier.

About this task

When you add or delete an EDI identifier in Sterling Supply Chain Visibility, you must also add or delete that EDI identifer in Sterling B2B Collaboration Network. You can perform this task using the Document Tracking application in Sterling B2B Collaboration Network.

Procedure

To add a new EDI identifier, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator.
2. Click **Administration > Manage My EDI IDs** .
3. In the Add/Delete EDI IDs panel, click the **Add a Record** icon. A new row appears.
   - In the first text box, enter the Qualifier code.
   - In the second text box, enter the EDI identifier.
4. To delete an EDI identifier that you just added, click the **Delete a Record** icon.
5. Click **Save**.

Deleting an EDI Identifier

Buyer and seller administrators can delete an EDI Identifier.

About this task

When you add or delete an EDI identifier in Sterling Supply Chain Visibility, you must also add or delete that EDI identifer in Sterling B2B Collaboration Network. You can perform this task using the Document Tracking application in Sterling B2B Collaboration Network.

Procedure

To delete an EDI identifier, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator.
2. Click **Administration > Manage My EDI IDs**.
3. Select the check box for the qualifier you want to delete.
4. Click **Delete**.

Chapter 6. Configuring User-Defined Fields

Buyer and seller administrators can define user-defined fields. You can specify these fields at the header level and line level of a purchase order, commitment, invoice, or shipment.

Procedure

To configure a user-defined field (UDF), follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator.
2. From the menu bar, select one of these options:
   - Buyers can click **Administration > Manage Inbound User Defined Fields**.
   - Sellers can click **Administration > Manage Outbound User Defined Fields**.

   The Manage User Defined Fields page is displayed.
3. You can define fields on the following panels of the Manage User Defined Fields page:
   - User Defined Fields for Order panel
   - User Defined Fields for Order Line panel
   - User Defined Fields for Order Commitment panel
   - User Defined Fields for Order Line Commitment panel
   - User Defined Fields for Shipment panel
   - User Defined Fields for Shipment Line panel
   - User Defined Fields for Invoice panel
   - User Defined Fields for Invoice Line panel
4. Define the following settings for your user-defined fields:

Table 7. Fields on Manage User Defined Fields Page

Field	Description
Field Name	Enter the name for the user-defined field. The name must be 40 characters or less. Ensure that the name is different from the standard fields that are provided by Sterling Supply Chain Visibility.
Show in Search Criteria	Select this option to include the field when you run a search in Sterling Supply Chain Visibility. For example, you might want to search for the **Sales Order Number** on the Search Criteria panel of the Find Purchase Order page.
Show in List	Select this option to include the field in the Listing panel on Sterling Supply Chain Visibility pages. For example, you can display the **Sales Order Number** on the Listing panel of the Find Purchase Order page.
Show in Detail	Select this option to include the field on detail pages in Sterling Supply Chain Visibility. For example, you can display the **Sales Order Number** on the Purchase Order Detail page.

Table 7. Fields on Manage User Defined Fields Page (continued)

Field	Description
Include in Shipment	Select this option to include the field on the following pages: • Search Criteria panel of the Find Shipment page. You must also select the **Show in Search Criteria** check box. • The Listing panel of the Find Shipment page. You must also select the **Show in List** check box. • Shipment Detail page. You must also select the **Show in Detail** check box. For example: • You define a user-defined field called **Booking Number**. • You select the **Include in Shipment** and **Show in List** check boxes. • **Booking Number** is included in the Listing panel of the Find Purchase Order and Find Shipment pages.

5. Click **Save** to create your user-defined fields.

Chapter 7. Business Calendars

Buyer and seller administrators can configure a business calendar for their enterprise. You can specify non-working days, such as holidays and special events.

When Sterling Supply Chain Visibility sends alerts that are based on dates, the system refers to the business calendar. Alerts are only raised based on the working days in the business calendar. If an alert is configured so that it would be raised on a non-working day, the alert is raised on the next working day.

For example:

1. In the business calendar, Sunday is defined as a non-working day. Monday is defined as a working day.
2. Based on the alert configuration, the alert will be raised on a Sunday.
3. Sterling Supply Chain Visibility sends the alert on Monday instead.

If the alert is configured to be raised after a specified number of days, and a non-working day occurs within the configured number of days, Sterling Supply Chain Visibility skips the non-working days. The system sends the alert on a working day.

For example:

1. In the business calendar, Saturday and Sunday are defined as non-working days. Monday through Friday are defined as working days.
2. Based on the alert configuration, the alert will be raised two days after an event occurs. In this example, the event occurs on a Friday.
3. Sterling Supply Chain Visibility sends the alert on Tuesday, which is two working days after the event occurred on Friday. The system ignores Saturday and Sunday because they are non-working days.

The following rules apply to using the business calendar:

- If you have not configured and saved a business calendar, Sterling Supply Chain Visibility uses the default calendar for your organization.
- Alerts that are not date-based will be raised, even if the current day is a non-working day.
- The following alerts are not raised based on the business calendar:
  - Invoice With Invalid PO
  - PO Rejected By Supplier
  - Shipment Quantity Overage
  - Invoice With Invalid Customer PO
  - Payment Received
- If a document was processed before you created a business calendar, Sterling Supply Chain Visibility does not evaluate the document again to determine whether an alert should be raised.

Configuring the Business Calendar

Buyer and seller administrators can configure their business calendar in Sterling Supply Chain Visibility.

Procedure

To configure the Business Calendar, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator. The Dashboard is displayed.
2. Click **Administration > Configure Business Calendar**. The Configure Business Calendar page is displayed.
3. You can perform the following tasks on the Configure Business Calendar page:
   - Define working days.
   - Add, update, or delete non-working dates.
4. You can perform the following actions to update your business calendar:

Action	Description
Save	Saves the business calendar.
Delete	Deletes the selected non-working date.

Defining Working Days

Buyer and seller administrators can define working days for their business calendar.

Procedure

To define the working days for each week, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator. The Dashboard is displayed.
2. Click **Administration > Configure Business Calendar**. The Configure Business Calendar page is displayed.
3. In the Working Days panel, select each day that is a working day in a week. If you do not select a day, it is considered to be a non-working day.
4. Click **Save**.

Adding a Non-Working Date

Buyer and seller administrators can add a non-working date to the business calendar.

Procedure

To add a non-working date, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator. The Dashboard is displayed.
2. Click **Administration > Configure Business Calendar**. The Configure Business Calendar page is displayed.
3. In the Non-Working Dates panel, click the **Add a Record** icon. A new row is added to the panel.

   You can also enter a numeric value in the text box, and click the **Add a Record** icon to add the corresponding number of new rows.
4. Enter the date that you want to declare as a non-working date. Use the date format that is defined for your organization's locale.

You can also click the **Calendar Entry** icon to select a date.

5. Click **Save**. By default, non-working dates are listed with the earliest date first and the last date at the end.

Modifying a Non-Working Date

Buyer and seller administrators can modify a non-working date in their business calendar.

Procedure

To modify a non-working date, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator. The Dashboard is displayed.
2. Click **Administration > Configure Business Calendar**. The Configure Business Calendar page is displayed.
3. Select the non-working date that you want to modify and enter the new date. Enter the date in the format for your organization's locale.

   You can also click the **Calendar Entry** icon to select a date.
4. Click **Save**.

Deleting a Non-Working Date

Buyer and seller administrators can delete a non-working date from their business calendar.

Procedure

To delete a non-working date, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator. The Dashboard is displayed.
2. Click **Administration > Configure Business Calendar**. The Configure Business Calendar page is displayed.
3. Select the non-working date and click **Delete**.
4. Click **OK** to confirm the deletion.

Chapter 8. Saving Search Criteria

Buyer and seller administrators can create and save search criteria. You can run this saved search each time you use Sterling Supply Chain Visibility.

Procedure

To save the search criteria, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator.
2. When you select a menu option, the Search Criteria window opens for that feature.

   For example, a buyer administrator can search for suppliers, receiving locations, or order flows. A seller administrator can search for customers (buyers).
3. Click **Save this Search**. The Save Search page is displayed. Define the following options:

Table 8. Save Search

Field	Description
Search Name	Enter the name for the saved search.
Auto Execute	Select the **Auto Execute** check box to automatically run the search each time you open the Search window for this menu option.

Chapter 9. Custom Events

Buyer and seller administrations can create custom events, which trigger alerts or chargebacks based on the criteria you define.

For example a buyer might want to receive an alert for the following custom events:

- There is a quantity mismatch within an order or between an order and the shipment
- The order does not complete a specific milestone within a configured time period.

Buyers can also configure how chargebacks are calculated. For example, you might want to calculate the chargeback amount as a percentage of the freight charge or the total invoice cost.

Creating Custom Events for Buyers

Buyer administrators can create custom events for purchase orders and shipments.

Procedure

To create a custom event as a buyer, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Create Inbound Event**. The Configure Event page is displayed.

   You can also create an inbound event by navigating to **Alerts > Manage Events** and clicking the **Create Inbound Event** related task.
3. Enter the event information in the Step 1: Primary Info panel of the Configure Event page. The actions and fields in the Step 1: Primary Info panel are described in the following tables.

   Note:

   - As you complete the steps during the creation of an inbound event, the details of the configurations that you performed in each step are listed on the right-hand side of the panel in the Configure Event page.
   - If you pass both order and shipment reference numbers in a chargeback, the shipment references take precedence and override the order references.

Table 9. Step 1: Primary Info Panel

Field	Description
Event Name	Enter the name of the event. Ensure that the event name is unique and that a similar event name does not already exist in your organization. **Note:** When an external event is sent to Sterling Supply Chain Visibility, the events are matched by event name.

Table 9. Step 1: Primary Info Panel (continued)

Field	Description
Order Flow Description	If order flow validation is required, select the order flow type from the list for that order flow. If you select **All** as the **Order Flow Description**, then **Chargeback Supplier** check box has to be selected and during evaluation of the event, Order Flow validation will be disabled. **Note:** In the Step 1 primary Info panel: 1. If you do not select an option from the **Order Flow Description** list, the application will consider the default order flow. 2. If you have selected **All**, the next page that follows will have **When Notified Externally or Manually** option only.

Table 10. Step 1: Primary Info Panel

Field	Description
Send alert to dashboard	Select this check box to display the corresponding alert in the Alert List panel of the dashboard.
Notify alert via XML	Select this check box to send the corresponding alert to the buyer in XML format. You can export an alert as an XML file to a third-party application. For more information about exporting an alert as an XML file, contact IBM Customer Support.
Notify alert via e-mail	Select this check box to send the corresponding alert to the buyer through email. The message is sent to the email address registered with the organization.
Notify alert via e-mail to Supplier	Select this check box to send the corresponding alert to the supplier through email. The message is sent to the email address specified during the supplier on-boarding process.

Table 10. Step 1: Primary Info Panel (continued)

Field	Description
Chargeback Supplier with Billing Type of <Billing Type> and flat fee amount of **(OR)** % value of <Amount> plus admin fee of <Amount> subject to a minimum chargeback amount of <Amount>	Select this check box to generate a chargeback against the supplier and select a billing type from the list. Based on the selected billing type, you must enter either the value of the flat fee or the percentage value of the billing type. You can additionally add an optional administrator's fee to the chargeback amount and also specify a minimum chargeback amount. The specified minimum chargeback amount **(C)** is compared against the sum of the generated chargeback amount **(A)** and the administrator's fee **(B)**, and the final chargeback amount is calculated as listed here: • If the value of **(A+B)** is less than the value of **C**, the value of **C** is considered as the final chargeback amount. • If the value of **(A+B)** is greater than or equal to the value of **C**, the value of **C** is disregarded and the value of **(A+B)** is considered as the final chargeback amount. • If the value of **(A+B)** is equal to zero, and assuming there are no errors, the value of **C** is considered as the final chargeback amount. **Note:** • When calculating the chargeback amount, the administrator's fee, if specified, is added to the generated chargeback amount and this sum is compared against the minimum chargeback amount to finalize the chargeback amount. • The default values of the minimum chargeback amount and administrator's fee is zero. • The minimum chargeback amount and the administrator's fee, if specified and applied to the generated chargeback amount, are not indicated in the final chargeback amount displayed in the Chargeback Amount panel of the Chargeback Detail page.

Table 10. Step 1: Primary Info Panel (continued)

Field	Description
Do not generate this chargeback when chargeback is generated for the event <Events>	Select an event from the list to define dependencies against other events for the event being defined. During chargeback generation for the event being defined, Sterling Supply Chain Visibility will validate whether another event (with chargeback) was generated for the same order or shipment. If a chargeback already exists, only the alert for the event being defined is raised and a new chargeback is not generated. For example, when the Shipment Not Received alert or the ASN Not Received alert is raised against a supplier, Sterling Supply Chain Visibility applies a pre-configured chargeback against this supplier. If the supplier sends the shipment or ASN after these alerts are raised, the Shipment Shipped Late alert is triggered. However, because of the configured event dependency, an additional chargeback is not applied to the supplier. **Note:** • This list is only enabled if the **Chargeback Supplier with Billing Type of <Billing Type> and flat fee amount of (OR) % value of <Amount>** option is enabled. • All events configured in the system are available in the list. However, only events relevant to the billing type selected in the **Chargeback Supplier with Billing Type of <Billing Type> and flat fee amount of (OR) % value of <Amount>** option can be used for creating dependency against the event being defined. If you select an incompatible event, a **This event cannot be configured for the selected chargeback billing type** error message is displayed.

The billing types available in Step 1: Primary Info panel are described in the following table:

Table 11. Step 1: Primary Info Panel, Billing Type

Billing Type	Description
Flat fee Per Order	Select this billing type to calculate the chargeback amount as a fixed value per order. That is, a specific amount per order is considered for chargeback calculation regardless of the amount or size of the order. This billing type is applicable only for order-based events generated by Sterling Supply Chain Visibility and externally generated events. **Note:** If this event is raised externally, the order number must be sent in the event. The **Order #** hyperlink in the Primary Information panel of the Chargeback Detail page is only displayed if this order exists in the system.
Flat fee Per Shipment	Select this billing type to calculate the chargeback amount as a fixed value per shipment. That is, a specific amount per shipment is considered for chargeback calculation regardless of the amount or size of the shipment. This billing type is applicable only for shipment-based events generated by Sterling Supply Chain Visibility and externally generated events. **Note:** If this event is raised externally, the shipment number must be sent in the event. The **Shipment #** hyperlink in the Primary Information panel of the Chargeback Detail page is only displayed if this shipment exists in the system.
Flat fee Per Invoice	Select this billing type to calculate the chargeback amount as a fixed value per invoice. That is, a specific amount per invoice is considered for chargeback calculation regardless of the amount in the invoice. This billing type is applicable only for externally generated events. **Note:** When this event is raised externally, the Invoice must be sent in the event. The **Invoice #** hyperlink in the Primary Information panel of the Chargeback Detail page is only displayed if this invoice exists in the system.

Table 11. Step 1: Primary Info Panel, Billing Type (continued)

Billing Type	Description
Flat fee Per Order Line Unit	Select this billing type to calculate the chargeback amount as a fixed value of the item quantity per line in an order. That is, a specific amount per order line is considered for chargeback calculation regardless of the amount or size of the order or order line. This billing type is applicable only for externally generated events. **Note:** When this event is raised externally, the order number, line number, and Receipt Quantity must be sent in the event. The **Order #** hyperlink in the Primary Information panel of the Chargeback Detail page is only displayed if this order exists in the system. If the quantity is not sent in the event XML, then the quantity of the specified line number will be considered for raising the chargeback.
Flat fee Per Shipment Line Unit	Select this billing type to calculate the chargeback amount as a fixed value of the item quantity per line in a shipment. That is, a specific amount per shipment line is considered for chargeback calculation regardless of the amount or size of the shipment or shipment line. This billing type is applicable only for externally generated events. **Note:** When this event is raised externally, the shipment number, shipment line number, and quantity must be sent in the event. The **Shipment #** hyperlink in the Primary Information panel of the Chargeback Detail page is only displayed if this shipment exists in the system. If the quantity is not submitted, and the associated order or shipment does not exist in the system, this event will not be accepted.

Table 11. Step 1: Primary Info Panel, Billing Type (continued)

Billing Type	Description
Flat fee Per Carton	Select this billing type to calculate the chargeback amount as a fixed value per carton in a shipment. That is, a specific amount per carton is considered for chargeback calculation regardless of the amount or size of the shipment or carton. This billing type is applicable only for externally generated events. **Note:** When this event is raised externally, the shipment number must be sent in the event. The value of **# of Cartons** can also be optionally sent in the event. If the value of **# of Cartons** is not sent, the value in the associated shipment number is considered. The **Shipment #** hyperlink in the Primary Information panel of the Chargeback Detail page is only displayed if this shipment exists in the system. If the shipment number does not exist in the system, this event will not be accepted.
% of Order Amount	Select this billing type to calculate the chargeback amount as a percentage of the order amount. That is, a specific percentage of the total amount of an order is considered for chargeback calculation regardless of the other details for the order. The total amount of an order does not include charges and discounts. This billing type is applicable only for order-based events generated by Sterling Supply Chain Visibility and externally generated events. You can enter any number of decimal places for the percentage value. However, the percentage value you entered is rounded to the nearest second decimal. For example, if you enter 10.23756 as the percentage value, the value is rounded and displayed as 10.24% in the Event Summary panel of this event. **Note:** If this event is raised externally, the order number must be sent in the event. The **Order #** hyperlink in the Primary Information panel of the Chargeback Detail page is only displayed if this order exists in the system. If the order number does not exist in the system, this event will not be accepted.

Table 11. Step 1: Primary Info Panel, Billing Type (continued)

Billing Type	Description
% of Shipment Amount	Select this billing type to calculate the chargeback amount as a percentage of the shipment amount. That is, a specific percentage of the total amount for shipping is considered for chargeback calculation regardless of the other details for the shipment. The shipment amount of a shipped line is the product of shipped quantity and item unit price of the corresponding order line. This billing type is applicable only for shipment-based events generated by Sterling Supply Chain Visibility and externally generated events. You can enter any number of decimal places for the percentage value. However, the percentage value you entered is rounded to the nearest second decimal. For example, if you enter 10.23756 as the percentage value, the value is rounded and displayed as 10.24% in the Event Summary panel of this event. **Notes:** • If this event is raised externally, the shipment number must be sent in the event. The **Shipment #** hyperlink in the Primary Information panel of the Chargeback Detail page is only displayed if this shipment exists in the system. If the shipment number does not exist in the system, this event will not be accepted. • If the order corresponding to the shipment or the shipment line does not exist in the system, a zero amount chargeback is issued.

Table 11. Step 1: Primary Info Panel, Billing Type (continued)

Billing Type	Description
% of Invoice Amount	Select this billing type to calculate the chargeback amount as a percentage of the grand total of the invoice amount. That is, a specific percentage of the grand total amount of an invoice is considered for chargeback calculation regardless of the other details for the invoice. The grand total amount of the invoice is inclusive of all the charges and taxes. This billing type is applicable only for externally generated events. You can enter any number of decimal places for the percentage value. However, the percentage value you entered is rounded to the nearest second decimal. For example, if you enter 10.23756 as the percentage value, the value is rounded and displayed as 10.24% in the Event Summary panel of this event. **Notes:** • When this event is raised externally, the invoice number must be sent in the event. The **Invoice #** hyperlink in the Primary Information panel of the Chargeback Detail page is only displayed if this invoice exists in the system. If the invoice number does not exist in the system, this event will not be accepted. • If multiple invoices exist with the same invoice number, only the first invoice is considered for calculating the chargeback amount.

Table 11. Step 1: Primary Info Panel, Billing Type (continued)

Billing Type	Description
% of Freight Charge	Select this billing type to calculate the chargeback amount as a percentage of the freight charge. That is, a specific percentage of the total amount of the freight charge is considered for chargeback calculation regardless of the other details for the shipment or order. This billing type is applicable only for externally generated events. You can enter any number of decimal places for the percentage value. However, the percentage value you entered is rounded to the nearest second decimal. For example, if you enter 10.23756 as the percentage value, the value is rounded and displayed as 10.24% in the Event Summary panel of this event. **Note:** When this event is raised externally, the Total Freight Charge, shipment number, and order number must be sent in the event. The **Order #** and **Shipment #** hyperlinks in the Primary Information panel of the Chargeback Detail page are only displayed if this shipment or order exists in the system.
% of Labor Charge	Select this billing type to calculate the chargeback amount as a percentage of the labor charge. That is, a specific percentage of the total amount of the labor charge is considered for chargeback calculation regardless of the other details for the shipment or order. This billing type is applicable only for externally generated events. You can enter any number of decimal places for the percentage value. However, the percentage value you entered is rounded to the nearest second decimal. For example, if you enter 10.23756 as the percentage value, the value is rounded and displayed as 10.24% in the Event Summary panel of this event. **Note:** When this event is raised externally, the Total Labor Charge, shipment number, and order number must be sent in the event. The **Order #** and **Shipment #** hyperlinks in the Primary Information panel of the Chargeback Detail page are only displayed if this shipment or order exists in the system.

4. Click **Next**. The Step 2: Event Criteria panel is displayed.
5. The fields that are displayed in the Step 2: Event Criteria panel depend on your choice in the Primary Info panel. Select the required option. The fields in the Step 2: Event Criteria panel are described in the following table:

Table 12. Step 2: Event Criteria Panel

Field	Description
When order reaches a milestone or does not reach a milestone within stipulated time	Select this option to raise the alert when the order reaches, or does not reach, a specific milestone within a specific time period. This alert is raised at the order header level.
When shipment reaches a milestone or does not reach a milestone within stipulated time	Select this option to raise the alert when a shipment is in a specific milestone for which you want to customize the alert. This alert is raised at the shipment level.
When certain date based conditions are met on an order	Select this option to raise the alert when the order meets some conditions based on the date selected by you. This alert is raised at the order header level.
When certain date based conditions are met on a shipment	Select this option to raise the alert when a shipment meets some conditions based on the date selected by you. This alert is raised at the shipment level.
When there is a quantity mismatch within an order or between an order and shipment	Select this option to raise the alert when there is a mismatch in the quantity within an order or between an order and its related shipment. This alert is raised at the order header level.
When the receiving location changes for an order line or if an order is added to or removed from the watch list	Select this option to raise the alert when there is a change in the receiving location of an order line, or the order is added or removed from the watch list.
When notified externally or manually	Select this option to raise the alert when an externally generated event is received, or a manually configured event is triggered. **Note:** An event can be triggered as an external event or a manually configured event only if you select this option.

6. Click **Next**. The Step 3: Detailed Criteria for Raising Alert panel is displayed.
7. The fields that are displayed in the Step 3: Detailed Criteria for Raising Alert panel depend on your choices in the Primary Info panel and Step 2: Event Criteria panel.
8. If you select the **When order reaches a milestone or does not reach a milestone within stipulated time** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Orders - Milestone Based panel is displayed. The fields in this panel are described in the following table:

Table 13. Step 3: Detailed Criteria for Raising Alert, For Orders - Milestone Based

Field	Description
Order comes to <milestone type> milestone	Select this option to raise the alert when the order enters a specific milestone. Select the order milestone from the list. The new alert is raised when the order milestone changes to the specified milestone. For example, to raise the alert when the milestone of the order changes to Acknowledged, select **Acknowledged** from the list.
Order has been in <milestone type> milestone for <number> days <number> hours	Select this option to raise the alert if the order is in a specific milestone for a specific period of time. Enter the milestone, number of days, and number of hours. The new alert is raised if the order has been in the specified milestone for the specified period of time. For example, to raise the alert when the order has been in the Created milestone for 2 days and 3 hours, select **Created** from the list and enter **2** days and **3** hours. Use the same procedure to raise alerts for any of the milestones in the list. The milestones for which this alert can be raised are: • Created • Acknowledged • Partially Committed • Committed • Partially Shipped • Shipped • Partially Delivered • Delivered • Partially Invoiced • Invoiced • Rejected

Table 13. Step 3: Detailed Criteria for Raising Alert, For Orders - Milestone Based (continued)

Field	Description
Order has not reached. <milestone type> milestone for <number> days <number> hours beyond expected date	Select this option to raise the alert if the expected date has passed and the order has not reached a particular milestone, even after the specified time period has elapsed. From the list, select: **Acknowledged**: Raise the alert if the order does not reach the Acknowledged milestone after the specified time period, beyond the expected date. The expected date for receiving a PO acknowledgment is the sum of the order creation date and the time taken to send the acknowledgment for the order. **Committed**: Raise the alert if the order does not reach the Committed milestone after the specified time period, beyond the expected date. The expected date for receiving a PO commitment is the sum of the order creation date and the time taken to send the commitment for the order. **Shipped**: Raise the alert if the order does not reach the Shipped milestone after the specified time period, beyond the expected date. The expected date for receiving a PO in the Shipped milestone is the maximum ship date. **Delivered**: Raise the alert if the order does not reach the Delivered milestone after the specified time period, beyond the expected date. The expected date for receiving a PO delivery is the maximum expected delivery date. **Invoiced**: Raise the alert if the order does not reach the Invoiced milestone after the specified time period, beyond the expected date. The expected date for receiving a PO invoice is the maximum expected delivery date.

Table 13. Step 3: Detailed Criteria for Raising Alert, For Orders - Milestone Based (continued)

Field	Description
Order has not reached <milestone type> milestone for <number> day(s) and <number> hours after order entered <milestone type> milestone.	Select this option to raise the alert if the order does not reach a specific milestone for a specific period after it has entered a specific milestone. Select the milestone from the list and enter the number of days and number of hours. The new alert is raised when the order does not reach the specified milestone for the specified period of time after it has entered the specified milestone. For example, to raise the alert when the order does not reach Committed milestone for 2 days and 4 hours after it has entered Acknowledged milestone, select **Committed** from the first list, enter **2** days and **4** hours, and select **Acknowledged** from the second list.
Any order line quantity has achieved another milestone	Select this option to raise an alert when the milestone of an order line changes.

9. If you select the **When shipment reaches a milestone or does not reach a milestone within stipulated time** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Shipments - Milestone Based panel is displayed. The fields in this panel are described in the following table:

Table 14. Step 3: Detailed Criteria for Raising Alert, For Shipments - Milestone Based

Field	Description
Shipment comes to <milestone type> milestone	Select this option to raise the alert when the shipment enters a specific milestone. Select the shipment milestone from the list. The new alert is raised when the shipment milestone changes to the specified milestone. For example, to raise the alert when the milestone of the shipment changes to Shipped, select **Shipped** from the list.
Shipment has been in shipped milestone for <number> days <number> hours	Select this option to raise the alert if the shipment is in a specific milestone for a specified period of time. Enter the milestone, number of days, and number of hours. The alert is raised if the shipment has been in the specified milestone for the specified period of time. For example, to raise the alert when the shipment has been in the Shipped milestone for 2 days and 3 hours, enter **2** days and **3** hours.

Table 14. Step 3: Detailed Criteria for Raising Alert, For Shipments - Milestone Based (continued)

Field	Description
Shipment has not been delivered for <number> days <number> hours beyond expected delivery date	Select this option to raise the alert if the expected date has passed and the shipment has not reached the Delivered milestone, even after the specified time period has elapsed. For example, to raise the alert when the shipment has not been delivered for 2 days and 3 hours, enter **2** days and **3** hours.
Shipment has not reached <milestone type> milestone for <number> day(s) and <number> hours after shipment entered <milestone type> milestone.	Select this option to raise the alert if the shipment does not reach a specific milestone for a specific period after it has entered a specific milestone. Select the milestone from the list and enter the number of days and number of hours. The new alert is raised when the shipment does not reach the specified milestone for the specified period of time after it has entered the specified milestone. For example, to raise the alert when the shipment does not reach At Port milestone for 2 days and 4 hours after it has entered Shipped milestone, select **At Port** from the first list, enter **2** days and **4** hours, and select **Shipped** from the second list.

10. If you select the **When certain date based conditions are met on an order** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Order - Date Reminder panel is displayed. The fields in this panel are described in the following table:

Table 15. Step 3: Detailed Criteria for Raising Alert, For Order - Date Reminder

Field	Description
<number> days <number> hours before <minimum date criteria>	Select this option to raise the alert for the order at the specified time period before the specified minimum date. Enter the number of days and hours, and select the minimum date from the list. For example, to raise the alert 2 days and 3 hours before the Min Requested Ship Date, enter **2** days and **3** hours and select **Min Requested Ship Date** from the list.
<number> days <number> hours after <maximum date criteria>	Select this option to raise the alert for the order at the specified time period after the specified maximum date. Enter the number of days and hours, and select the maximum date from the list. For example, to raise the alert 2 days and 3 hours after the Order Date, enter **2** days and **3** hours and select **Order Date** from the list.

Table 15. Step 3: Detailed Criteria for Raising Alert, For Order - Date Reminder (continued)

Field	Description
If ASN is not received <number> day(s) <number> hour(s) before the next order schedule's expected delivery date	Enter the number of allowable days and hours before the expected delivery date of the next order schedule, within which the ASN can be received. Sterling Supply Chain Visibility raises an alert if the difference between the expected delivery time of the order schedule and the current time is less then the number of days and hours that you configure.
If ASN is not received <number> day(s) <number> hour(s) after the next order schedule's expected ship date	Enter the number of allowable days and hours beyond the expected ship date of the next order schedule, within which the ASN can be received. Sterling Supply Chain Visibility raises an alert if the ASN is not received and the difference between the current time and the expected ship time of the order schedule is more than the number of days and hours that you configure.

11. If you select the **When certain date based conditions are met on a shipment** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Shipments - Date Mismatch and Reminder panel is displayed. The fields in this panel are described in the following table:

Table 16. Step 3: Detailed Criteria for Raising Alert, For Shipments - Date Mismatch and Reminder

Field	Description
If <date criteria> is <number> days <number> hours before <date criteria>	Select this option to raise the alert for the shipment after comparing the dates for the specified criteria. Select the date criteria from the lists and enter the number of days and hours. For example, to raise the alert if the actual shipment date is 2 days and 3 hours before the expected delivery date, select **Actual Shipment Date** from the first list, enter **2** days and **3** hours, and select **Expected Delivery Date** from the second list.
If <date criteria> is <number> days <number> hours after <date criteria>	Select this option to raise the alert for the shipment after comparing the dates for the specified criteria. Select the date criteria from the lists and enter the number of days and hours. For example, to raise the alert if the actual delivery date is 2 days and 3 hours after the expected delivery date, select **Actual Delivery Date** from the first list, enter **2** days and **3** hours, and select **Expected Delivery Date** from the second list.

Table 16. Step 3: Detailed Criteria for Raising Alert, For Shipments - Date Mismatch and Reminder (continued)

Field	Description
<number> days <number> hours before expected delivery date	Select this option to raise the alert for the shipment at the specified time period before the expected delivery date. Enter the number of days and hours. For example, to raise the alert 2 days and 3 hours before the expected delivery date, enter **2** days and **3** hours.
<number> days <number> hours after <date criteria>	Select this option to raise the alert for the shipment at the specified time period after a specific shipment date. Enter the number of days and hours and select the date criteria from the list. For example, to raise the alert 2 days and 3 hours after the actual shipment date, enter **2** days and **3** hours and select **Actual Shipment Date** from the list.
If Shipment is shipped <number> day(s) <number> hour(s) before requested ship date of any order line	Enter the allowable number of days and hours. Sterling Supply Chain Visibility raises an alert if the actual shipment date of the shipment occurs before the tolerance period that you configure.
If Shipment is shipped <number> day(s) <number> hour(s) after requested ship date of any order line	Enter the allowable number of days and hours. Sterling Supply Chain Visibility raises an alert if the actual shipment date of the shipment exceeds the tolerance period that you configure.

12. If you select the **When there is a quantity mismatch within an order or between an order and shipment** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Order and Shipment - Quantity Mismatch panel is displayed. The fields in this panel are described in the following table:

Table 17. Step 3: Detailed Criteria for Raising Alert, For Order and Shipment - Quantity mismatch

Field	Description
Order Line Shipped Quantity exceeds <order line quantity>by <number> <UOM>	Select this option to raise the alert if the quantity shipped in the order line exceeds a specific quantity criteria by the specified quantity. Select the quantity criteria of the order from the list. Enter the number of days and select the unit of measure from the list. For example, to raise the alert if the order line shipped quantity exceeds the order line ordered quantity by 2 units, select **Order Line Ordered Quantity** from the list and enter **2** Units. Select the unit of measure from the list.
Order Line Shipped Quantity is less than<order line quantity> by<number> <UOM>	Select this option to raise the alert if the quantity of the order line shipped is less than a specific quantity criteria by the specified quantity. Select the quantity criteria of the order from the list. Enter the number of days and select the unit of measure from the list. For example, to raise the alert if the order line shipped quantity is less than the order line committed quantity by 2 units, select **Order Line Committed Quantity** from the list and enter **2 Units**. Select the unit of measure from the list.
Shipment's Shipped Quantity exceeds <order line quantity> by <number> <UOM>	Select this option to raise the alert if the quantity shipped in the shipment line shipped exceeds a specific quantity criteria by the specified quantity. Select the quantity criteria of the order from the list. Enter the quantity and select the unit of measure from the list. For example, to raise the alert if the shipment line shipped quantity exceeds the order line ordered quantity by 2 units, select **Order Line Ordered Quantity** from the list and enter **2 Units**. Select the unit of measure from the list.
Shipment's Shipped Quantity is less than <order line quantity> by <number> <UOM>	Select this option to raise the alert if the quantity shipped in the shipment line is less than a specific quantity criteria by the specified quantity. Select the quantity criteria of from the list. Enter the quantity and select the unit of measure from the list. For example, to raise the alert if the shipment line shipped quantity is less than the order line ordered quantity by 2 units, select **Order Line Ordered Quantity** from the list and enter **2 Units**. Select the unit of measure from the list.

13. If you select the **When the receiving location changes for an order line or if an order is added to or removed from watch list** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Orders - Location and Watchlist Changes panel is displayed. The fields in this panel are described in the following table:

Table 18. Step 3: Detailed Criteria for Raising Alert, For Orders - Location and Watchlist Changes

Field	Description
Raise alert when Receiving Location of the order line changes	Select this option to raise the alert when there is a change in the receiving location of the order line. This alert is raised at the order line level.
Raise alert for order when order is added to or removed from watch list	Select this option to raise the alert when the order is added to or removed from the watch list. This alert is raised at the order header level.

14. Click **Next**. The Step 4: Additional Filter panel is displayed.
15. Specify the required additional filter criteria in the Step 4: Additional Filter panel. The filters that are available for selection in the **Add Filter** list depend on your choices in the Step 2: Event Criteria panel and in the Step 3: Detailed Criteria for Raising Alert panel. The actions and fields in the Step 4: Additional Filter panel are described in the following tables:

Table 19. Step 4: Additional Filter Actions

Action	Description
Add Filter To the List	Adds the filter that you just created in the Add Filter panel to the Filter List panel.
Modify	Select a filter in the Filter List panel and click **Modify** to change the filter.
Delete	Select a filter in the Filter List panel and click **Delete** to remove the filter.
The Filter List panel displays the list of filters that you have created for this alert. All the filters in this list must be satisfied for this alert to be raised.	

Table 20. Step 4: Additional Filter Fields

Field	Description
Add Filter	Select the required filter from the list: • **Supplier** • **Receiving Loc** • **Carrier** • **Dept Code** • **Latest Milestone** • **Order Type** • **On Watchlist Only** • **First Ship Fill Rate** **Note:** The filters that are available for selection in the **Add Filter** list depend on your choices in the Step 3: Detailed Criteria for Raising Alert panel and the Step 2: Event Criteria panel.
Supplier	Select this option from the **Add Filter** list to create a supplier-based filter. Select the **Supplier List** option or the **Supplier Group List** option to create a filter based on suppliers or supplier groups. Click the **Arrow** icons to move the selected supplier(s) between the Supplier List or Suppliers Group List panel and the Selected Suppliers or Selected Suppliers Groups panel. Click **Add Filter To the List** to add the supplier-based filter to the Filter List panel.
Receiving Loc	Select this option from the **Add Filter** list to create a receiving location-based filter. Click the **Arrow** icons to move the selected receiving location(s) between the Receiving Location List panel and the Selected Receiving Locations panel. Click **Add Filter To the List** to add the receiving location-based filter to the Filter List panel.
Carrier	Select this option from the **Add Filter** list to create a carrier-based filter. Click the **Arrow** icons to move the selected carrier(s) between the Carrier List panel and the Selected Carriers panel. Click **Add Filter To the List** to add the carrier-based filter to the Filter List panel.

Table 20. Step 4: Additional Filter Fields (continued)

Field	Description
Dept Code	Select this option from the **Add Filter** list to create a department-based filter. Click the **Arrow** icons to move the selected department(s) between the Department List panel and the Selected Departments panel. Click **Add Filter To the List** to add the department-based filter to the Filter List panel.
Latest Milestone	Select this option from the **Add Filter** list to create a milestone-based filter. Click the **Arrow** icons to move the selected milestone(s) between the Milestone List panel and the Selected Milestones panel. Click **Add Filter To the List** to add the milestone-based filter to the Filter List panel. **Note:** This option is not displayed in the **Add Filter** list if you select any of the following options in the Step 3: Detailed Criteria for Raising Alert panel: • Order comes to <milestone type> milestone. • Order has been in <milestone type> milestone for <number> day(s) <number> hour(s). • Order has not reached <milestone type> milestone for <number> day(s) <number> hour(s) after order entered <milestone type> milestone.
Order Type	Select this option from the **Add Filter** list to create a filter based on order type. Select the required order type to be included in the filter from the available order types, or enter an order type name to create a new order type. Click **Add Filter To the List** to add the filter for order type to the Filter List panel.
On Watchlist Only	Select this option from the **Add Filter** list to raise this alert only for those orders that are in the watch list. Select the check box for the **Add Filter** list, and click **Add Filter To the List** to add this filter to the Filter List panel.

Table 20. Step 4: Additional Filter Fields (continued)

Field	Description
First Ship Fill Rate	Select this option from the **Add Filter** list to create a filter based on the first ship fill rate value. Select the **Greater Than or Equal To or Less Than** option and enter the first ship fill rate. Click **Add Filter To the List** to add this filter to the Filter List panel.

16. Click **Next**. The Step 5: Activation panel is displayed.
17. The fields that are displayed in the Step 5: Activation panel depend on your choice in the Step 1: Primary Info panel. The fields in the Step 5: Activation panel are described in the following table:

Table 21. Step 5: Activation

Field	Description
Active	Select this option to activate this alert immediately on creation. If you have configured chargeback in Step 1: Primary Info panel, you can enter the date until which the zero chargeback amount is published to the supplier. You can also click the **Calendar Entry** icon to select a date.
Inactive	Select this option to maintain this alert in inactive status after creation. This alert will not be raised until it is activated.

18. Click **Finish**.

Creating Custom Events for Sellers

Seller administrators can create custom events for customer purchase orders and shipments.

Procedure

To create a custom event as a seller, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator. The Dashboard is displayed.
2. Click **Alerts > Create Outbound Event**. The Configure Event page is displayed.

   You can also create an outbound event by navigating to **Alerts > Manage Events** and clicking the **Create Outbound Event** related task.
3. Enter the event information in the Step 1: Primary Info panel of the Configure Event page. The actions and fields in the Step 1: Primary Info panel are described in the following tables.

Note: As you complete the steps during the creation of an outbound event, the details of the configurations that you performed in each step are listed on the right-hand side of the panel in the Configure Event page.

Table 22. Step 1: Primary Info Panel

Field	Description
Event Name	Enter the name of the event.
Order Flow Description	Select the order flow type from the list to which the event is assigned. **Note:** If you do not select an option from the **Order Flow Description** list in the Step 1: Primary Info panel of the Configure Event page, the application will consider the default order flow.

Table 23. Step 1: Primary Info Panel

Field	Descriptions
Send alert to dashboard	Displays the alert in the Alert List panel of the Dashboard.
Notify alert via e-mail	Sends the alert to the seller through email. The email is sent to the email address that is registered for the organization.
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.

4. Click **Next**. The Step 2: Event Criteria panel is displayed.
5. Select the required option in the Step 2: Event Criteria panel. The fields in the Step 2: Event Criteria panel are described in the following table:

Table 24. Step 2: Event Criteria Panel

Field	Description
When order reaches a milestone or does not reach a milestone within stipulated time	Select this option to raise the alert when the order reaches, or does not reach, a specific milestone within a specific time period. This alert is raised at the order header level.
When shipment reaches a milestone or does not reach a milestone within stipulated time	Select this option to raise the alert when a shipment is in a specific milestone for which you want to customize the alert. This alert is raised at the shipment level.
When certain date based conditions are met on an order	Select this option to raise the alert when the order meets some conditions based on the date selected by you. This alert is raised at the order header level.
When certain date based conditions are met on a shipment	Select this option to raise the alert when a shipment meets some conditions based on the date selected by you. This alert is raised at the shipment level.

Table 24. Step 2: Event Criteria Panel (continued)

Field	Description
When there is a quantity mismatch within an order or between an order and shipment	Select this option to raise the alert when there is a mismatch in the quantity within an order or between an order and its related shipment. This alert is raised at the order header level.
When the receiving location changes for an order line or if an order is added to or removed from watch list	Select this option to raise the alert when there is a change in the receiving location of an order line, or the order is added to or removed from the watch list.
When order is canceled	Select this option to raise the alert when a change order is received from the buyer for canceling the entire order. The alert is not raised if the order is partially canceled. This alert is raised at the order header level. **Note:** • This alert is not auto resolvable. • If the alert is not resolved manually and the same alert is triggered again, only the value of the **Raised Count** is incremented in the corresponding Alert Detail page. A new alert is not raised. • The alert will not be raised if a change order is received for cancelling a previously canceled order.

Note: If you select the **When Order Is Canceled** option in the Step 2: Event Criteria panel and click **Next**, the Step 3: Detailed Criteria for Raising Alert panel is skipped, and the Step 4: Additional Filter panel is displayed.

6. Click **Next**. The Step 3: Detailed Criteria for Raising Alert panel is displayed.
7. The fields that are displayed in the Step 3: Detailed Criteria for Raising Alert panel, depend on your choices in the Step 2: Event Criteria panel.
8. If you select the **When Order Reaches a Milestone or Does Not Reach a Milestone Within Stipulated Time** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Orders - Milestone Based panel is displayed. The fields in this panel are described in the following table:

Table 25. Step 3: Detailed Criteria for Raising Alert, For Orders - Milestone Based

Field	Description
Order comes to <milestone type> milestone	Select this option to raise the alert when the order enters a specific milestone. Select the order milestone from the list. The new alert is raised when the order milestone changes to the specified milestone. For example, to raise the alert when the milestone of the order changes to **Acknowledged**, select **Acknowledged** from the list.

Table 25. Step 3: Detailed Criteria for Raising Alert, For Orders - Milestone Based (continued)

Field	Description
Order has been in <milestone type> milestone for <number> days <number> hours	Select this option to raise the alert if the order is in a specific milestone for a specific period of time. Enter the milestone, number of days, and number of hours. The new alert is raised if the order has been in the specified milestone for the specified period of time. For example, to raise the alert when the order has been in the Created milestone for 2 days and 3 hours, select **Created** from the list and enter **2** days and **3** hours in the boxes. Use the same procedure to raise alerts for any of the milestones in the list. The milestones for which this alert can be raised are: • **Created** • **Acknowledged** • **Partially Committed** • **Committed** • **Partially Shipped** • **Shipped** • **Partially Delivered** • **Delivered** • **Partially Invoiced** • **Invoiced** • **Rejected**

Table 25. Step 3: Detailed Criteria for Raising Alert, For Orders - Milestone Based (continued)

Field	Description
Order has not reached. <milestone type> milestone for <number> days <number> hours beyond expected date	Select this option to raise the alert if the expected date has passed and the order has not reached a particular milestone, even after the specified time period has elapsed. From the list, select: **Acknowledged**: Raise the alert if the order does not reach the Acknowledged milestone after the specified time period, beyond the expected date. The expected date for receiving a PO acknowledgment is the sum of the order creation date and the time taken to send the acknowledgment for the order. **Committed**: Raise the alert if the order does not reach the Committed milestone after the specified time period, beyond the expected date. The expected date for receiving a PO commitment is the sum of the order creation date and the time taken to send the commitment for the order. **Shipped**: Raise the alert if the order does not reach the Shipped milestone after the specified time period, beyond the expected date. The expected date for receiving a PO in the Shipped milestone is the maximum ship date. **Delivered⌂**: Raise the alert if the order does not reach the Delivered milestone after the specified time period, beyond the expected date. The expected date for receiving a PO delivery is the maximum expected delivery date. **Invoiced**: Raise the alert if the order does not reach the Invoiced milestone after the specified time period, beyond the expected date. The expected date for receiving a PO invoice is the maximum expected delivery date.

Table 25. Step 3: Detailed Criteria for Raising Alert, For Orders - Milestone Based (continued)

Field	Description
Order has not reached <milestone type> milestone for <number> day(s) and <number> hours after order entered <milestone type> milestone.	Select this option to raise the alert if the order does not reach a specific milestone for a specific period after it has entered a specific milestone. Select the milestone from the list and enter the number of days and number of hours. The new alert is raised when the order does not reach the specified milestone for the specified period of time after it has entered the specified milestone. For example, to raise the alert when the order does not reach Committed milestone for 2 days and 4 hours after it has entered Acknowledged milestone, select **Committed** from the first list, enter **2** days and **4** hours in the boxes, and select **Acknowledged** from the second list.
Any order line quantity has achieved another milestone	Select this option to raise an alert when the milestone of an order line changes.

9. If you select the **When shipment reaches a milestone** or **does not reach a milestone within stipulated time** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Shipments - Milestone Based panel is displayed. The fields in this panel are described in the following table:

Table 26. Step 3: Detailed Criteria for Raising Alert, For Shipments - Milestone Based

Field	Description
Shipment comes to <milestone type> milestone	Select this option to raise the alert when the shipment enters a specific milestone. Select the shipment milestone from the list. The new alert is raised when the shipment milestone changes to the specified milestone. For example, to raise the alert when the milestone of the shipment changes to Shipped, select **Shipped** from the list.
Shipment has been in shipped milestone for <number> days <number> hours	Select this option to raise the alert if the shipment is in a specific milestone for a specified period of time. Enter the milestone, number of days, and number of hours. The alert is raised if the shipment has been in the specified milestone for the specified period of time. For example, to raise the alert when the shipment has been in the Shipped milestone for 2 days and 3 hours, enter **2** days and **3** hours in the boxes.

Table 26. Step 3: Detailed Criteria for Raising Alert, For Shipments - Milestone Based (continued)

Field	Description
Shipment has not been delivered for <number> days <number> hours beyond expected delivery date	Select this option to raise the alert if the expected date has passed and the shipment has not reached the Delivered milestone, even after the specified time period has elapsed. For example, to raise the alert when the shipment has not been delivered for 2 days and 3 hours, enter **2** days and **3** hours in the boxes.
Shipment has not reached <milestone type> milestone for <number> day(s) and <number> hours after shipment entered <milestone type> milestone.	Select this option to raise the alert if the shipment does not reach a specific milestone for a specific period after it has entered a specific milestone. Select the milestone from the list and enter the number of days and number of hours. The new alert is raised when the shipment does not reach the specified milestone for the specified period of time after it has entered the specified milestone. For example, to raise the alert when the shipment does not reach At Port milestone for 2 days and 4 hours after it has entered Shipped milestone, select **At Port** from the first list, enter **2** days and **4** hours in the boxes, and select **Shipped** from the second list.

10. If you select the **When certain date based conditions are met on an order** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Order - Date Reminder panel is displayed. The fields in this panel are described in the following table:

Table 27. Step 3: Detailed Criteria for Raising Alert, For Order - Date Reminder

Field	Description
<number> days <number> hours before <minimum date criteria>	Select this option to raise the alert for the order at the specified time period before the specified minimum date. Enter the number of days and hours in the boxes, and select the minimum date from the list. For example, to raise the alert 2 days and 3 hours before the Min Requested Ship Date, enter **2** days and **3** hours in the boxes and select **Min Requested Ship Date** from the list.

Table 27. Step 3: Detailed Criteria for Raising Alert, For Order - Date Reminder (continued)

Field	Description
<number> days <number> hours after <maximum date criteria>	Select this option to raise the alert for the order at the specified time period after the specified maximum date. Enter the number of days and hours in the boxes, and select the maximum date from the list. For example, to raise the alert 2 days and 3 hours after the Order Date, enter **2** days and **3** hours in the boxes and select **Order Date** from the list.

11. If you select the **When Certain Date Based Conditions are Met on a Shipment** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Shipments - Date Mismatch and Reminder panel is displayed. The fields in this panel are described in the following table:

Table 28. Step 3: Detailed Criteria for Raising Alert, For Shipments - Date Mismatch and Reminder

Field	Description
If <date criteria> is <number> days <number> hours before <date criteria>	Select this option to raise the alert for the shipment after comparing the dates for the specified criteria. Select the date criteria from the lists and enter the number of days and hours in the boxes. For example, to raise the alert if the actual shipment date is 2 days and 3 hours before the expected delivery date, select **Actual Shipment Date** from the first list, enter **2** days and **3** hours in the boxes, and select **Expected Delivery Date** from the second list.
If <date criteria> is <number> days <number> hours after <date criteria>	Select this option to raise the alert for the shipment after comparing the dates for the specified criteria. Select the date criteria from the lists and enter the number of days and hours in the boxes. For example, to raise the alert if the actual delivery date is 2 days and 3 hours after the expected delivery date, select **Actual Delivery Date** from the first list, enter **2** days and **3** hours in the boxes, and select **Expected Delivery Date** from the second list.
<number> days <number> hours before expected delivery date	Select this option to raise the alert for the shipment at the specified time period before the expected delivery date. Enter the number of days and hours in the boxes. For example, to raise the alert 2 days and 3 hours before the expected delivery date, enter **2** days and **3** hours in the boxes.

Table 28. Step 3: Detailed Criteria for Raising Alert, For Shipments - Date Mismatch and Reminder (continued)

Field	Description
<number> days <number> hours after <date criteria>	Select this option to raise the alert for the shipment at the specified time period after a specific shipment date. Enter the number of days and hours in the boxes and select the date criteria from the list. For example, to raise the alert 2 days and 3 hours after the actual shipment date, enter **2** days and **3** hours in the boxes and select **Actual Shipment Date** from the list.

12. If you select the **When There is a Quantity Mismatch Within an Order or Between an Order and Shipment** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Order and Shipment - Quantity Mismatch panel is displayed. The fields in this panel are described in the following table:

Table 29. Step 3: Detailed Criteria for Raising Alert, For Order and Shipment - Quantity mismatch

Field	Description
Order Line Shipped Quantity exceeds <order line quantity>by <number> <UOM>	Select this option to raise the alert if the quantity shipped in the order line exceeds a specific quantity criteria by the specified quantity. Select the quantity criteria of the order from the list. Enter the number of days in the box and select the unit of measure from the list. For example, to raise the alert if the order line shipped quantity exceeds the order line ordered quantity by 2 units, select **Order Line Ordered Quantity** from the list and enter **2** Units in the box. Select the unit of measure from the list.
Order Line Shipped Quantity is less than<order line quantity> by<number> <UOM>	Select this option to raise the alert if the quantity of the order line shipped is less than a specific quantity criteria by the specified quantity. Select the quantity criteria of the order from the list. Enter the number of days in the box and select the unit of measure from the list. For example, to raise the alert if the order line shipped quantity is less than the order line committed quantity by 2 units, select **Order Line Committed Quantity** from the list and enter **2** Units in the box. Select the unit of measure from the list.

Table 29. Step 3: Detailed Criteria for Raising Alert, For Order and Shipment - Quantity mismatch (continued)

Field	Description
Shipment's Shipped Quantity exceeds <order line quantity> by <number> <UOM>	Select this option to raise the alert if the quantity shipped in the shipment line shipped exceeds a specific quantity criteria by the specified quantity. Select the quantity criteria of the order from the list. Enter the quantity in the box and select the unit of measure from the list. For example, to raise the alert if the shipment line shipped quantity exceeds the order line ordered quantity by 2 units, select **Order Line Ordered Quantity** from the list and enter **2** Units in the box. Select the unit of measure from the list.
Shipment's Shipped Quantity is less than <order line quantity> by <number> <UOM>	Select this option to raise the alert if the quantity shipped in the shipment line is less than a specific quantity criteria by the specified quantity. Select the quantity criteria of from the list. Enter the quantity in the box and select the unit of measure from the list. For example, to raise the alert if the shipment line shipped quantity is less than the order line ordered quantity by 2 units, select **Order Line Ordered Quantity** from the list and enter **2** Units in the box. Select the unit of measure from the list.

13. If you select the **When the Receiving Location Changes for an Order Line or if an Order is Added to or Removed from Watch List** option in the Step 2: Event Criteria panel, the Step 3: Detailed Criteria for Raising Alert, For Orders - Location and Watchlist Changes panel is displayed. The fields in this panel are described in the following table:

Table 30. Step 3: Detailed Criteria for Raising Alert, For Orders - Location and Watchlist Changes

Field	Description
Raise alert when Receiving Location of the order line changes	Select this option to raise the alert when there is a change in the receiving location of the order line. This alert is raised at the order line level.
Raise alert for order when order is added to or removed from watch list	Select this option to raise the alert when the order is added to or removed from the watch list. This alert is raised at the order header level.

14. Click **Next**. The Step 4: Additional Filter panel is displayed.
15. Specify the required additional filter criteria in the Step 4: Additional Filter panel. The filters that are available for selection in the **Add Filter** list depend on your choices in the Step 3: Detailed Criteria for Raising Alert panel and the Step 2: Event Criteria panel.

Table 31. Step 4: Additional Filter

Action	Description
Add Filter To the List	Adds the filter that you just created in the Add Filter panel to the Filter List panel.
Modify	Select a filter in the Filter List panel and click **Modify** to change the filter.
Delete	Select a filter in the Filter List panel and click **Delete** to remove the filter.

Table 32. Step 4: Additional Filter

Field	Description
Add Filter	Select the required filter from the list. The available filters are: • Customer • Carrier • Latest Milestone • Order Type • On Watchlist Only **Note:** The filters that are available for selection in the **Add Filter** list depend on your choices in the Step 3: Detailed Criteria for Raising Alert panel and the Step 2: Event Criteria panel.
Customer	Select this option from the **Add Filter** list to create a customer-based filter. Click the **Arrow** icons to move the selected customer(s) between the Customer List panel and the Selected Customers panel. Click **Add Filter To the List** to add the customer-based filter to the Filter List panel.
Carrier	Select this option from the **Add Filter** list to create a carrier-based filter. Click the **Arrow** icons to move the selected carrier(s) between the Carrier List panel and the Selected Carriers panel. Click **Add Filter To the List** to add the carrier-based filter to the Filter List panel.

Table 32. Step 4: Additional Filter (continued)

Field	Description
Latest Milestone	Select this option from the **Add Filter** list to create a milestone-based filter. Click the **Arrow** icons to move the selected milestone(s) between the Milestone List panel and the Selected Milestones panel. Click **Add Filter To the List** to add the milestone-based filter to the Filter List panel. **Note:** This option is not displayed in the **Add Filter** list if you select any of the following options in the Step 3: Detailed Criteria for Raising Alert panel: • Order comes to <milestone type> milestone. • Order has been in <milestone type> milestone for <number> day(s) <number> hour(s). • Order has not reached <milestone type> milestone for <number> day(s) <number> hour(s) after order entered <milestone type> milestone.
Order Type	Select this option from the **Add Filter** list to create a filter based on order type. Select the required order type to be included in the filter from the available order types, or enter an order type name to create a new order type. Click **Add Filter To the List** to add the filter for order type to the Filter List panel.
On Watchlist Only	Select this option from the **Add Filter** list to raise this alert only for those orders that are in the watch list. Select the check box for the **Add Filter** list, and click **Add Filter To the List** to add this filter to the Filter List panel.
Filter List	This panel displays the list of filters that you have created for this alert. All the filters in this list must be satisfied for this alert to be raised.

16. Click **Next**. The Step 5: Activation panel is displayed. The fields in this panel are described in the following table:

Table 33. Step 5: Activation

Field	Description
Active	Select this option to activate this alert immediately on creation.
Inactive	Select this option to maintain this alert in inactive status after creation. This alert will not be raised until it is activated.

17. Click **Finish**.

Modifying Custom Events

Buyer and seller administrators can modify custom events.

Procedure

To modify a custom event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator, seller administrator, or supplier relations officer (SRO).
2. Click **Alerts > Manage Events**. The Manage Events page is displayed.
3. In the Configure Events panel, select the custom event that you want to change.
4. Click **Modify** in the Event Summary panel to modify the details of this event such as event name, order flow type, and event actions.
5. Click **Save** to save your changes.

Deleting Custom Events

Buyers and sellers can delete custom events in Sterling Supply Chain Visibility.

Procedure

To delete a custom event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator, seller administrator, or supplier relations officer (SRO).
2. Click**Alerts > Manage Alerts**. The Manage Events page is displayed.
3. In the Configure Events panel, select the custom event that you want to remove.
4. Click **Delete** in the Event Summary panel to delete this custom event.

   Notes:

   a. You cannot delete standard events that are provided by Sterling Supply Chain Visibility.
   b. You cannot delete a custom event if it has any open alerts filed against it.

Chapter 10. Buyer Administration

Buyer administrators can configure their suppliers, departments, alerts, carriers, and other features in Sterling Supply Chain Visibility.

Buyers can configure the following capabilities in Sterling Supply Chain Visibility:

- Departments
- Receiving Locations
- Default Supplier Preferences
- Suppliers
- Supplier Groups
- User Subscriptions
- Carriers
- Carrier Validation
- Buyer Alerts

In addition, both buyer and seller administrators can perform General Administration Tasks in Sterling Supply Chain Visibility.

Buyers can subscribe to the optional Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal module. To configure this module, see Chapter 20, "Sterling Vendor Compliance Module," on page 109.

Chapter 11. Departments

Buyer administrators can define departments for their organization.

You can assign your users to one or more departments. Your organization can also track the orders that are being placed for each department.

To manage departments, ensure that you subscribed during Sterling Supply Chain Visibility registration to monitor orders to your suppliers.

Adding a Department

Buyer administrators can add a department for their organization. They can then associate one or more users with the department.

Procedure

To add a department, follow these steps:
1. Log in to Sterling Supply Chain Visibility as a buyer administrator. The Dashboard is displayed.
2. Click **Administration > Manage Departments**. The Department List panel is displayed on the Configure Department page.
3. In the Department List panel, click the **Add a Record** icon.
4. Enter the **Department Code** for the buying department.
5. Enter the **Department Name** for the buying department.
6. To remove the department that you just added, click the **Delete a Record** icon.
7. Click **Save** to create the department.

Modifying a Department

Buyer administrators can modify a department to change the name.

Procedure

To modify a department, follow these steps:
1. Log in to Sterling Supply Chain Visibility as a buyer administrator. The Dashboard is displayed.
2. Click **Administration > Manage Departments**. The Department List panel is displayed on the Configure Department page.
3. Enter a new **Department Name** for the selected department. You cannot change the **Department Code**.
4. Click **Save** to update the department name.

Viewing the Department List

Buyer administrators can view the departments they have created in Sterling Supply Chain Visibility.

Procedure

To view the available departments, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator. The Dashboard is displayed.
2. Click **Administration > Manage Departments**. The Department List panel is displayed on the Configure Department page. The Department List panel displays the following fields:

Table 34. Department List Fields on Configure Department Page

Field	Description
Department Code	Shows the code of the department for which the order is placed.
Department Name	Shows the name of the department for which the order is placed.

3. You can perform the following actions to manage your departments:

Table 35. Department List Actions on Configure Department Page

Action	Description
Add	Click the **Add a Record** icon to add a new row to the Department List table. You can enter the **Department Code** and **Department Name** entries.
Delete	Deletes the selected department.

Deleting a Department

Buyer administrators can delete a department they created for their organization.

Procedure

To delete a department, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator. The Dashboard is displayed.
2. Click **Administration > Manage Departments**.
3. Select the check box for the **Department Code** you want to remove.
4. Click **Delete**.

Chapter 12. Receiving Locations

Buyer administrators can define receiving locations to manage supplier deliveries to these facilities.

You can assign users in your organization to manage deliveries at one or more delivery locations.

To manage receiving locations, ensure that you subscribed during Sterling Supply Chain Visibility registration to monitor orders to your suppliers.

Searching for Receiving Locations

Buyer administrators can search for receiving locations they created in Sterling Supply Chain Visibility.

Procedure

To search for receiving locations, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Receiving Locations**. The Search Criteria panel is displayed on the Find Receiving Location page.
3. Enter the following search criteria and click **Search**:

Table 36. Search Criteria for Find Receiving Location Page

Field	Description
Location Code	Enter the identifier of the location you want to search for.
Location Name	Enter the name of the location you want to search for.
Max Records	Enter the maximum number of records to include in the search results. By default, **Max Records** is set to 30. The maximum value that you can enter is 500.

4. You can view the search results in the Listing panel of the Find Receiving Location page:

Table 37. Search Results for Find Receiving Location Page

Field	Description
Location Code	Shows the identifier of the location where the shipment is received.
Location Name	Shows the name of the location where the shipment is received.
City, State	Shows the city and the state or province of the receiving location.

5. You can perform the following actions to manage your receiving locations:

Table 38. Actions for Find Receiving Location Page

Action	Description
Modify	Opens the Configure Receiving Location page, where you can modify the selected location.
Add	Opens the Add Receiving Location page, where you can define a new receiving location.
Delete	Deletes the selected location.

Adding a Receiving Location

Buyer administrators can add a new receiving location to Sterling Supply Chain Visibility.

Procedure

To create a receiving location, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Receiving Locations**. The Find Receiving Location page is displayed.
3. Enter the search criteria and click **Search**. A list of receiving locations is displayed in the Listing panel of the Find Receiving Location page.
4. Click **Add** to open the Add Receiving Location page.
5. In the New Location panel, enter the following settings.

Field	Description
Location Code	Enter the identifier of the location where the shipments are received.
Location Name	Enter the name of the location where the shipments are received.
City	Enter the city of the receiving location.
State	Enter the state or province of the receiving location.

6. Click **Save** to create the receiving location.

Modifying a Receiving Location

Buyer administrators can modify a receiving location they created in Sterling Supply Chain Visibility.

Procedure

To modify a receiving location, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Receiving Locations**. The Find Receiving Location page is displayed.
3. Enter the location code or name and click **Search**. The receiving location is displayed in the Listing panel of the Find Receiving Location page.

4. Select the location and click **Modify**. The Configure Receiving Location page is displayed.
5. You can update the following fields:
   - Location Name
   - City
   - State

   You cannot change the **Location Code** of an existing location. If you want to change the location code, you can delete the location and add a new location to replace it.
6. Click **Save**.

Deleting a Receiving Location

Buyer administrators can delete a receiving location they created in Sterling Supply Chain Visibility.

Procedure

To delete a receiving location, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Receiving Locations**. The Find Receiving Location page is displayed.
3. Enter the location code or name and click **Search**. The receiving location is displayed in the Listing panel of the Find Receiving Location page.
4. Select the location and click **Delete**.

Chapter 13. Configuring Default Supplier Preferences

Buyers can configure default supplier preferences. Sterling Supply Chain Visibility applies these preferences when it creates a profile for a new supplier.

Before you begin

To configure default supplier preferences, ensure that you subscribed during Sterling Supply Chain Visibility registration to monitor orders to your suppliers.

About this task

When a buyer submits a purchase order, Sterling Supply Chain Visibility checks to see if the buyer has created a supplier profile for the seller specified in the order. If no supplier profile exists, Sterling Supply Chain Visibility automatically creates the profile. The system uses your default supplier preferences to populate the new profile.

When you manually create a supplier profile, Sterling Supply Chain Visibility does not apply the default supplier preferences to the new profile. You define your own parameters for each supplier profile.

Procedure

To configure default supplier preferences, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Default Supplier Preference**. The Supplier Configuration panel is displayed on the Default Supplier Preferences page. You can define the following fields:

Table 39. Default Supplier Preferences

Field	Description
Sends Functional Acknowledgement	Select this option to require the supplier to send a functional acknowledgement for each purchase order.
Functional Acknowledgement Time (Hrs)	Specify how much time the supplier has to submit the acknowledgement after it receives the order. For example, enter **12** if you require the supplier to send the acknowledgement within 12 hours of receiving the purchase order.
Sends Commitment	Select this option to require the supplier to send a commitment for each purchase order.
Commitment Time (Hrs)	Specify how much time the supplier has to submit the commitment after it receives the order. For example, enter **24** if you require the supplier to send the commitment within 24 hours of receiving the purchase order.

Table 39. Default Supplier Preferences (continued)

Field	Description
Sends ASN	Select this option to require the supplier to send an ASN for each purchase order.

3. Click **Save**.

   Tip: Buyers can subscribe to the PO Functional Acknowledgment Not Received alert, PO Commitment Not Received alert, and the ASN Not Received alert. Sterling Supply Chain Visibility sends these alerts to the buyer if the supplier does not submit the required documents in time.

Chapter 14. Managing Suppliers

Buyer administrators can use Sterling Supply Chain Visibility to manage supplier profiles.

You can add, modify, or delete suppliers. You can also view the details of existing suppliers.

To manage suppliers, ensure that you subscribed during Sterling Supply Chain Visibility registration to monitor orders to your suppliers.

Searching for Suppliers

Buyer administrators can search for suppliers in Sterling Supply Chain Visibility.

Procedure

To search for suppliers, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or an SRO user.
2. Click **Administration > Manage Suppliers**. The Search Criteria panel is displayed on the Find Supplier page.
3. Enter the following search criteria and click **Search**:

Table 40. Search Criteria for Find Supplier Page

Field	Description
Supplier ID	Enter the identifier of the supplier you want to search for.
Supplier Name	Enter the name of the supplier you want to search for.
Max Records	Enter the maximum number of records to include in the search results. By default, **Max Records** is set to 30. The maximum value that you can enter is 500.

4. You can view the search results in the Listing panel of the Find Supplier page:

Table 41. Search Results for Find Supplier Page

Field	Description
Supplier ID	Shows the unique identifier for the supplier. Click the **Supplier ID** hyperlink to view the Configure Supplier page.
Supplier Name	Shows the name of the supplier.
Sends Functional Acknowledgement	Displays one of these options: • **Y**: The supplier is required to send functional acknowledgements. • **N**: The supplier is not required to send functional acknowledgements.

Table 41. Search Results for Find Supplier Page (continued)

Field	Description
Functional Acknowledgement Time (Hrs)	Shows how much time the supplier has to submit the acknowledgement after it receives the order.
Sends Commitment	Displays one of these options: • **Y**: The supplier is required to send commitments. • **N**: The supplier is not required to send commitments.
Commitment Time (Hrs)	Shows how much time the supplier has to submit the commitment after it receives the order.
Sends ASN	Displays one of these options: • **Y**: The supplier is required to send Advanced Shipment Notice (ASN) documents. • **N**: The supplier is not required to send ASN documents.
City	Shows the city in which the supplier is located.

5. You can perform the following actions to manage your suppliers:

Table 42. Actions for Find Supplier Page

Action	Description
Add	Opens the Add Supplier page, where you can define a new supplier. Only buyer administrators can add a supplier. An SRO user cannot add a supplier.
Modify	Opens the Configure Supplier page, where you can modify the supplier profile.
Delete	Deletes the selected supplier. Only buyer administrators can delete a supplier. An SRO user cannot delete supplier.

Adding a Supplier

Buyer administrators can create a supplier profile in Sterling Supply Chain Visibility.

Procedure

To add a new supplier, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.

   Note: The SRO is not authorized to add new suppliers.
2. Click **Administration > Manage Suppliers**. The Search Criteria panel is displayed on the Find Supplier page.

3. Enter the search criteria and click **Search**. A list of suppliers is displayed in the Listing panel of the Find Supplier page.
4. Click **Add** to open the Add Supplier page.
5. Define the fields on the Add Supplier page.
6. Click **Save** to save the supplier profile.

Supplier Profile Entries

Buyer administrators can define a supplier profile when they add or modify a supplier.

The Add Supplier and Configure Supplier pages contain the following panels:

- Supplier Details Panel
- Supplier Configuration Panel
- Supplier's Additional EDI IDs Panel
- Compliance Configuration Panel

Supplier Details Panel

Buyer administrators can define the following fields on the Supplier Details panel of the Add Supplier and Configure Supplier pages. The SRO user cannot define the fields on the Supplier Details panel.

Field	Description
Supplier Name	Enter the name of the supplier. If you update a supplier profile, you cannot change the supplier name.
Supplier ID	Enter a unique identifier for the supplier. If you update a supplier profile, you cannot change the Supplier ID.
Qualifier/EDI ID	In the **Qualifier** box, enter the code that is used to designate the sender ID element for the supplier. In the **EDI ID** box, enter the Electronic Data Interchange (EDI) code for the supplier. If you update a supplier profile, you cannot change an existing qualifier or EDI ID.
Address Line 1	Enter the first line of the supplier's address.
Address Line 2	Enter the optional second line of the supplier's address.
Address Line 3	Enter the optional third line of the supplier's address.
City	Enter the city where the supplier is located.
State	Enter the state or province where the supplier is located.
Zip Code	Enter the postal code of the area where the supplier is located.
Country	Enter the country or region where the supplier is located.
Phone #	Enter the telephone number of the supplier.

Field	Description
E-mail	Enter the email address of the supplier.

Supplier Configuration Panel

Buyer administrators and SRO users can define the following fields on the Supplier Configuration panel of the Add Supplier and Configure Supplier pages.

Field	Description
Sends Functional Acknowledgement	Select this option to require the supplier to send a functional acknowledgement for each purchase order.
Functional Acknowledgement Time (Hrs)	Specify how much time the supplier has to submit the acknowledgement after it receives the order. For example, enter **12** if you require the supplier to send the acknowledgement within 12 hours of receiving the purchase order.
Sends Commitment	Select this option to require the supplier to send a commitment for each purchase order.
Commitment Time (Hrs)	Specify how much time the supplier has to submit the commitment after it receives the order. For example, enter **24** if you require the supplier to send the commitment within 24 hours of receiving the purchase order.
Sends ASN	Select this option to require the supplier to send an ASN for each purchase order.

Tip: Buyers can subscribe to the PO Functional Acknowledgment Not Received alert, PO Commitment Not Received alert, and the ASN Not Received alert. Sterling Supply Chain Visibility sends these alerts to the buyer if the supplier does not submit the required documents in time.

Supplier's Additional EDI IDs Panel

Buyer administrators can define the following fields on the Supplier's Additional EDI IDs panel of the Add Supplier and Configure Supplier pages. The SRO user cannot define the fields on the Supplier's Additional EDI IDs panel.

Field	Description
Qualifier	Enter the code enter that is used to designate the sender ID element for the supplier. If you update a supplier profile, you cannot change an existing qualifier.
EDI ID	Enter the new EDI ID for the supplier. If you update a supplier profile, you cannot change an existing EDI ID.

Click the **Add a Record** icon to define new qualifiers and EDI IDs.

To remove an EDI identifier, select the EDI ID entry and click **Delete**.

If you also subscribe to IBM Sterling Supplier Portal, the EDI IDs displayed in the Supplier's Additional EDI IDs panel are updated when the corresponding supplier details are updated in Sterling Supplier Portal.

Based on the synchronization configuration of the supplier's community in Sterling Supplier Portal, the supplier details are published to Sterling Supply Chain Visibility. This synchronization ensures that the supplier details in Sterling Supplier Portal match the supplier details in Sterling Supply Chain Visibility.

Compliance Configuration Panel

The Compliance Configuration panel is only displayed if your organization subscribes to the optional IBM Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal module.

Buyer administrators and SRO users can define the following fields on the Compliance Configuration panel of the Add Supplier and Configure Supplier pages.

Field	**Description**
Put this supplier on a grace period until <date>	Enter the date when the grace period expires for the supplier. Until this date, chargebacks will not be applied to the supplier, and chargebacks will not be published to external applications. You can also click the **Calendar Entry** icon to select a date. The following rules apply to defining the grace period: • You can enter one day prior to the current date. You cannot enter a date earlier than yesterday's date. • If you do not enter any value, the grace period is defined as zero days.

Related tasks:

"Modifying a Supplier"
Buyer administrators can modify a supplier profile.

"Viewing Supplier Details" on page 74
Buyer administrators can view the details of a supplier profile they created in Sterling Supply Chain Visibility.

Modifying a Supplier

Buyer administrators can modify a supplier profile.

Procedure

To modify a supplier profile, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or an SRO user.
2. Click **Administration >Manage Suppliers**. The Search Criteria panel is displayed on the Find Supplier page.

3. Enter the search criteria and click **Search**. A list of suppliers is displayed in the Listing panel of the Find Supplier page.
4. Select the check box for the **Supplier ID** of the supplier you want to update.
5. Click **Modify** to open the Configure Supplier page.
6. Update the fields on the Configure Supplier page.
7. Click **Save** to save your changes to the supplier profile.

   Notes:
   - You cannot change the **Supplier ID** and **Supplier Name** when you update a supplier profile.
   - The SRO user is only permitted to modify the data in the Supplier Configuration panel and the Compliance Configuration panel of the Configure Supplier page.

Related reference:

"Supplier Profile Entries" on page 71
Buyer administrators can define a supplier profile when they add or modify a supplier.

Deleting a Supplier

Buyer administrators can remove a supplier profile they created in Sterling Supply Chain Visibility.

Procedure

To delete a supplier profile, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.

   Note: The SRO is not authorized to delete suppliers.
2. Click **Administration > Manage Suppliers**. The Search Criteria panel is displayed on the Find Supplier page.
3. Enter the search criteria and click **Search**. A list of suppliers is displayed in the Listing panel of the Find Supplier page.
4. Select the check box for the **Supplier ID** you want to delete.
5. Click **Delete** to remove the selected supplier.

Viewing Supplier Details

Buyer administrators can view the details of a supplier profile they created in Sterling Supply Chain Visibility.

Procedure

To view the details of a supplier profile, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or an SRO user.
2. Click **Administration > Manage Suppliers**. The Search Criteria panel is displayed on the Find Supplier page.
3. Enter the search criteria and click **Search**. A list of suppliers is displayed in the Listing panel of the Find Supplier page.
4. Click the **Supplier ID** hyperlink for the supplier you want to work with. The Configure Supplier page is displayed.

5. View or update the fields on the Configure Supplier page.
6. Click **Save** to save your changes to the supplier profile.

Related reference:

"Supplier Profile Entries" on page 71
Buyer administrators can define a supplier profile when they add or modify a supplier.

Adding EDI Identifiers for Suppliers

Buyer administrators can add EDI identifiers for their suppliers.

Procedure

To add EDI identifiers for a supplier, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or an SRO user.
2. Click **Administration > Manage Suppliers**. The Search Criteria panel is displayed on the Find Supplier page.
3. Enter the search criteria and click **Search**. A list of suppliers is displayed in the Listing panel of the Find Supplier page.
4. Select the **Supplier ID** check box for the supplier you want to change and click **Modify**. The Configure Supplier page displays the existing details for the selected supplier.
5. In the Supplier's Additional EDI IDs panel, click the **Add a Record** icon to add new qualifiers and EDI IDs. A new row appears.
6. Enter the **Qualifier** and **EDI ID** fields.
7. To delete an EDI ID that you just added, click the **Delete a Record** icon.
8. Click **Save**.

Results

If you also subscribe to IBM Sterling Supplier Portal, the EDI IDs displayed in the Supplier's Additional EDI IDs panel are updated when the corresponding supplier details are updated in Sterling Supplier Portal.

Based on the synchronization configuration of the supplier's community in Sterling Supplier Portal, the supplier details are published to Sterling Supply Chain Visibility. This synchronization ensures that the details of a specific supplier in Sterling Supplier Portal match the corresponding supplier in Sterling Supply Chain Visibility.

Setting Up Email for Suppliers

Buyer administrators can specify the email address they will use to send emails to each supplier.

Procedure

To set up email for a supplier, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or an SRO user.
2. Click **Administration > Manage Suppliers**. The Search Criteria panel is displayed on the Find Supplier page.

3. Enter the search criteria and click **Search**. A list of suppliers is displayed in the Listing panel of the Find Supplier page.
4. Select the **Supplier ID** check box for the supplier and click **Modify**.
5. On the Configure Supplier page, enter the supplier email address in the **E-mail** field.
6. Click **Save**.

Chapter 15. Supplier Groups

Buyer administrators can define supplier groups to help manage their seller organizations in Sterling Supply Chain Visibility.

Searching for Supplier Groups

Buyer administrators can search for supplier groups they created in Sterling Supply Chain Visibility.

Procedure

To search for supplier groups, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Supplier Groups**. The Search Criteria panel is displayed on the Find Supplier Group page.
3. Enter the following search criteria and click **Search**:

Table 43. Search Criteria for Find Supplier Group Page

Field	Description
Supplier Group Name	Enter the name of the supplier group. You can also select one of the following values from the list to search for a supplier group: • **is**: The search returns the exact value you entered. • **starts with**: The search returns all the supplier groups that start with the entered value. • **contains**: The search returns all the supplier groups that contain the entered value.
Max Records	Enter the maximum number of records to include in the search results. By default, **Max Records** is set to 30. The maximum value that you can enter is 500.

4. You can view the search results in the Listing panel of the Find Supplier Group page. For each record, the **Supplier Group Name** and **Supplier Group Desc** are displayed.
5. You can perform the following actions to manage your supplier groups:

Table 44. Actions for Find Supplier Group Page

Action	Description
Add	Opens the Add Supplier Group page, where you can define a new supplier group.
Modify	Select the check box for the supplier group you want to change. Click **Modify** to open the Configure Supplier Group page, where you can change the supplier group.

Table 44. Actions for Find Supplier Group Page (continued)

Action	Description
Delete	Select the check box for the supplier group you want to delete. Click **Delete** to remove the supplier group.

Adding a Supplier Group

Buyer administrators can create supplier groups to organize their vendors.

Procedure

To create a supplier group, follow these steps:
1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Supplier Groups**. The Search Criteria panel is displayed on the Find Supplier Group page.
3. Enter the search criteria and click **Search**. A list of supplier groups is displayed in the Listing panel of the Find Supplier Group page.
4. Click **Add** in the Listing panel of the Find Supplier Group page. The Add Supplier Group page is displayed.
5. In the Add Supplier Group panel, define the following settings:
   - **Supplier Group Name**: Enter a name for the supplier group.
   - **Supplier Group Desc**: Enter a description for the supplier group.
6. In the Add Supplier List panel, define the following settings:
   a. Click the **Add a Record** icon to add a new supplier. A new blank row is displayed that allows you to add the **Supplier ID** and **Supplier Name**.
   b. You can also enter a numeric value in the text box, and click the **Add a Record** icon to add the corresponding number of new rows.
   c. To delete the new row that you just added, click the **Delete a Record** icon.
   d. In the **Supplier ID**, enter the supplier identifier. You can also click the **Look Up** icon to search for a specific supplier ID.
   e. In the **Supplier Name**, enter the name of the supplier.
7. Click **Save** to create the new supplier group.

Modifying a Supplier Group

Buyer administrators can modify a supplier group they created in Sterling Supply Chain Visibility.

Procedure

To modify a supplier group, follow these steps:
1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Supplier Groups**. The Search Criteria panel is displayed on the Find Supplier Group page.
3. Enter the search criteria and click **Search**. A list of supplier groups is displayed in the Listing panel of the Find Supplier Group page.
4. Select the check box for the Supplier Group Name that you want to modify and click **Modify**. The Configure Supplier Group page displays the details for the selected supplier group.

5. In the Modify Supplier Group panel, view or change the following settings:
   - **Supplier Group Name**: You can view the name of the group but you cannot change it. If you want to change the name, you can delete this supplier group and then add a new group.
   - **Supplier Group Desc**: You can change the description of the supplier group.
6. In the Modify Supplier List panel, you have the following options:

   Adding a Supplier

   Click the **Add a Record** icon to add a new supplier. A blank row is added.

   You can also enter a numeric value in the text box and click the **Add a Record** icon to add the corresponding number of new rows.

   In the **Supplier ID**, enter the supplier identifier. You can also click the **Look Up** icon to search for a specific Supplier ID.

   In the **Supplier Name**, enter the name of the supplier.

   To delete the new row that you just added, click the **Delete a Record** icon.

   Deleting a Supplier

   Select the **Supplier ID** that you want to remove from the supplier group and click **Delete**.

   Modifying a Supplier

   You cannot change the **Supplier ID** or **Supplier Name** for an existing supplier. Instead, you can delete the supplier and add it to the group again.
7. Click **Save** to save the changes to the supplier group.

Deleting a Supplier Group

Buyer administrators can delete a supplier group they created in Sterling Supply Chain Visibility.

Procedure

To delete a supplier group, follow these steps:
1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Suppliers**. The Search Criteria panel is displayed on the Find Supplier page.
3. Enter the search criteria and click **Search**. A list of supplier groups is displayed in the Listing panel of the Find Supplier Group page.
4. In the Listing panel, select the check box for the **Supplier Group Name** that you want to delete.
5. Click **Delete** to remove the selected supplier group.

Chapter 16. User Subscriptions

Buyer administrators can subscribe a user to a department or receiving location.

These subscriptions allow the user to view alerts in the Sterling Supply Chain Visibility Dashboard:

- If users are subscribed to a department, they can view the order-based alerts that are generated for the orders belonging to that department.
- If users are subscribed to a receiving location, they can view the shipment-based alerts that are generated for the shipments belonging to that receiving location.

If a user is subscribed to one or more departments or receiving locations, the alerts are displayed in the Dashboard based on the business calendar configured for the organization.

Searching for Users

Buyer administrators can search for user profiles they have added to Sterling Supply Chain Visibility.

Procedure

To search for users, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Subscriptions**. The Search Criteria panel is displayed on the Modify User's Departments and Receiving Locations page.
3. Enter the following search criteria and click **Search**:

Table 45. Search Criteria for Modify User's Departments and Receiving Locations Page

Field	Description
User ID	Enter the unique User ID for the user you want to search for.
User Name	Enter the name of the user you want to search for.
Max Records	Enter the maximum number of records to include in the search results. By default, **Max Records** is set to 30. The maximum value that you can enter is 500.

4. You can view the search results in the Listing panel of the Modify User's Departments and Receiving Locations page. For each record, the **User ID** and **User Name** are displayed.
5. Select a user and click **Manage Subscriptions** to subscribe the user to a department or receiving location.

Subscribing a User to a Department or Receiving Location

Buyer administrators can subscribe a user to a department or receiving location.

Procedure

To subscribe a user to a department or receiving location, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Subscriptions**. The Search Criteria panel is displayed on the Modify User's Departments and Receiving Locations page.
3. Enter your search criteria and click **Search**. A list of users is displayed in the Listing panel of the Modify User's Departments and Receiving Locations page.
4. Select the check box for the user you want to define subscriptions for.
5. Click **Manage Subscriptions**. The Subscribe to Departments and Receiving Locations page is displayed. The User Details panel lists the user that you selected in Step 4:

Table 46. User Details Panel of Subscribe to Departments and Receiving Locations Page

Field	Description
User ID	Shows the unique identifier that was assigned to the user.
User Name	Shows the name of the user.

6. The Subscribed Departments panel lists the departments your organization has defined in Sterling Supply Chain Visibility. You can select the following action to subscribe the user to one or more departments:

Table 47. Actions for Subscribed Departments Panel

Action	Description
Subscribed?	You can select the following options: • To subscribe the user to all the listed departments, select the **Subscribed?** check box. • To subscribe the user to a single department, select the check box for that department. **Notes:** • If you select check boxes for more than one department and then select **Subscribed?**, all the check boxes are automatically selected. • If you clear the check box for any department after selecting **Subscribed?** and click **Save**, the **Subscribed?** check box is automatically cleared.

7. The Subscribed Receiving Locations panel lists the receiving locations your organization has defined in Sterling Supply Chain Visibility:

Table 48. Subscribed Receiving Locations Panel of Subscribe to Departments and Receiving Location Page

Field	Description
Location Code	Shows the unique identifier for the receiving location.
Location Name	Shows the name of the receiving location.
City, State	Shows the city and state or city and province of the receiving location.

8. You can select the following action to subscribe the user to one or more receiving locations:

Table 49. Actions for Subscribed Receiving Locations Panel

Action	Description
Subscribed?	You can select the following options: • To subscribe the user to all the listed receiving locations, select the **Subscribed?** check box. • To subscribe the user to a single location, select the check box for that location. **Notes:** • If you select check boxes for more than one location and then select **Subscribed?**, all the check boxes are automatically selected. • If you clear the check box for any receiving location after selecting **Subscribed?** and click **Save**, the **Subscribed?** check box is automatically cleared.

9. Click **Save** to save your subscriptions for the user.

Chapter 17. Managing Carriers

Buyer administrators can configure the carriers they work with in Sterling Supply Chain Visibility. You can upload a set of carrier profiles from a spreadsheet.

Searching for Carriers

Buyer administrators can search for the carriers they work with in Sterling Supply Chain Visibility.

Procedure

To search for a carrier, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Carriers**. The Search Criteria panel is displayed on the Find Carrier page.
3. Enter the following search criteria and click **Search**:

Table 50. Search Criteria for Find Carrier Page

Field	Description
Carrier	Enter the Standard Carrier Alpha Code (SCAC) of the carrier that you want to search for.
Max Records	Enter the maximum number of records to include in the search results. By default, **Max Records** is set to 30. The maximum value that you can enter is 500.

4. You can view the search results in the Listing panel of the Find Carrier page:

Table 51. Search Results for Find Carrier Page

Field	Description
Carrier	Shows the SCAC of the carrier.
SCAC Description	Shows the description, such as the carrier name or fleet name.

5. To add or modify your carrier profiles, click **Update Carriers**. The Manage Carriers page is displayed.

Uploading Carrier Profiles

Buyer administrators can upload a spreadsheet to add or update carrier profiles.

Procedure

To upload carrier profiles, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Carriers**. The Search Criteria page panel is displayed on the Find Carrier page.

3. Enter the search criteria and click **Search**. A list of carriers is displayed in the Listing panel of the Find Carrier page.
4. In the Listing panel of the Find Carrier page, click **Update Carriers**. The Manage Carriers page is displayed.
5. In the **Upload Files** field, enter the file name of the spreadsheet that contains the carriers you want to create, modify, or delete. You can also click **Browse** to locate the spreadsheet file
6. Click **Update Carriers**.

   A confirmation window shows whether the uploading process competed. If the uploading process failed, Sterling Supply Chain Visibility shows the reason for the failure.

Creating a Spreadsheet to Upload Carrier Profiles

Buyer administrators can create a spreadsheet to upload carrier profile data.

Procedure

To create a spreadsheet to update a carrier, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Manage Carriers**. The Search Criteria page panel is displayed on the Find Carrier page.
3. Enter the search criteria and click **Search**. A list of carriers is displayed in the Listing panel of the Find Carrier page.
4. Click **Update Carriers** to open the Manage Carriers page.
5. Click the **Download Sample** link and save the sample.xls file to your computer.
6. Open the sample.xls file to see examples of the carrier data you can load into Sterling Supply Chain Visibility.
7. Copy or edit the spreadsheet file to define each carrier record:

Table 52. Sample Carrier Details Spreadsheet

Field	Description
SCAC	Enter the SCAC of the carrier you want to create, modify, or delete. The SCAC is a required field.
SCAC Description	Enter a description, such as the carrier name or fleet name. The description can contain up to 100 characters.
Action	Select one of the following actions: • **Update**: The carrier record replaces the existing carrier record. If the carrier does not exist in Sterling Supply Chain Visibility, the system adds the new carrier record. • **Delete**: The carrier record is deleted from the system. If you do not select either action, Sterling Supply Chain Visibility performs the **Update** action by default.

Chapter 18. Validating Carriers

Buyers can have Sterling Supply Chain Visibility validate the carriers that are submitted in ASN and shipment update documents.

About this task

When Sterling Supply Chain Visibility validates the carriers, the system checks the carriers in the documents against the list of existing carriers. If the carrier name in the document does not match any of the existing carriers, Sterling Supply Chain Visibility rejects the document.

If you do not have Sterling Supply Chain Visibility perform carrier validation, the system processes each ASN or shipment update document. If the carrier name in the document does not match any of the existing carriers, the carrier is added to the list of allowed carriers.

Procedure

To validate carriers in ASN and shipment update documents, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator.
2. Click **Administration > Configure Carrier Validation**. The Validate Carrier panel is displayed on the Validate Carrier for Documents page.
3. To set up carrier validation, select one or both of the following options:
   - **ASN Arrives**: Perform carrier validation for each ASN. Reject the ASN if the carrier name is not stored in Sterling Supply Chain Visibility.
   - **Shipment Update Arrives**: Perform carrier validation for each shipment update. Reject the update if the carrier name is not stored in Sterling Supply Chain Visibility.
4. Click **Save**.

Chapter 19. Alerts for Buyers

Buyers can subscribe to a wide range of alerts in Sterling Supply Chain Visibility. Buyers can use the alerts to track issues in their order and shipment delivery operations.

As the buyer administrator, you can configure *events* in Sterling Supply Chain Visibility. For example, you can have the system check to make sure that your suppliers submit purchase order acknowledgements and commitments on time.

When exceptions occur in the supply chain workflow, Sterling Supply Chain Visibility sends *alerts* to your users.

Users can view the alerts on the Sterling Supply Chain Visibility Dashboard or receive an email.

You can also set up Sterling Supply Chain Visibility to generate an XML file for an alert. You can export these alert files to a third-party application. For more information about this process, contact IBM Customer Support.

Configuring the PO Commitment Not Received Event

Buyer administrators can configure the PO Commitment Not Received event. You can use this event to find out when the supplier has not submitted a commitment to a purchase order.

About this task

Sterling Supply Chain Visibility sends the PO Commitment Not Received alert for this workflow:

1. The buyer requires the seller to submit a commitment for each purchase order.
2. The seller defines a customer profile for the buyer in Sterling Supply Chain Visibility. The profile includes the **Commitment Time**, which specifies that the supplier will submit the commitment within a specified number of hours after the supplier receives the purchase order.
3. The seller does not submit the PO commitment before the **Commitment Time** period expires.

Procedure

To configure the PO Commitment Not Received event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator. The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the PO Commitment Not Received event in the Configure Events panel.
4. Click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the PO Functional Acknowledgment Not Received Event

Buyer administrators can configure the PO Functional Acknowledgment event.

Procedure

To configure the PO Functional Acknowledgment Not Received event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the PO Functional Acknowledgment Not Received event from the Configure Events panel and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

5. Click **Save** to save your alert configuration.
6. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Invoice With Invalid PO Event

Buyer administrators can configure the Invoice with Invalid PO event. Your users can receive an alert when you receive an invoice and there is no associated purchase order.

Procedure

To configure the Invoice with Invalid PO event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The **Configure Events** panel is displayed in the Manage Events page.

3. Select the Invoice With Invalid PO event from the Configure Events pane, and click **Modify** in the Event Summary. The Sterling as a Service Applications page is displayed.
4. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

5. Click **Save** to save your alert configuration.
6. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Payment Received Event

Buyer administrators can configure the rules for the Payment Received event. Your users can receive an alert when you receive payment for the customer purchase order.

Procedure

To configure the Payment Received event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator. The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Payment Received event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.

5. Click **Save** to save your alert configuration.
6. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the PO Commitment Changed Event

Buyer administrators can configure the PO Commitment Changed event.

Procedure

To configure the PO Commitment Changed event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the PO Commitment Changed event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define the following alert settings:

Field	Description
Raise alert if supplier committed date is <number> day(s) <number> hrs BEYOND last committed date.	Enter the number of allowable days and hours beyond the last supplier commit date, within which the present supplier commit date can exist. When the present supplier commit date is beyond the last supplier commit date of any order line, Sterling Supply Chain Visibility raises an alert if the mismatch between the present supplier commit date and the last supplier commit date is more than the number of days and hours that you configure.
Raise alert if supplier committed date is <number> day(s) <number> hrs BEFORE last committed date.	Enter the number of allowable days and hours before the last supplier commit date, within which the present supplier commit date can exist. When the present supplier commit date is before the last supplier commit date of any order line, Sterling Supply Chain Visibility raises an alert if the mismatch between the last supplier commit date and the present supplier commit date is more than the number of days and hours that you configure.
Raise alert if committed quantity is <number> % OVER last committed quantity.	Enter the allowable overage percentage. Sterling Supply Chain Visibility raises an alert if the committed quantity exceeds the last committed quantity, by a percentage that is more than what you configure.
Raise alert if committed quantity is <number>% UNDER last committed quantity.	Enter the allowable shortage percentage. Sterling Supply Chain Visibility raises an alert if the committed quantity is below the last committed quantity by a percentage that is less than what you configure.
Raise alert if committed price is <number>% OVER last committed price.	Enter the allowable overage percentage. Sterling Supply Chain Visibility raises an alert if the committed price is above the requested order line price by a percentage that is more than what you configure.

Field	Description
Raise alert if committed price is <number>% UNDER last committed price.	Enter the allowable shortage percentage. Sterling Supply Chain Visibility raises an alert if the committed price is below the requested order line price by a percentage that is less than what you configure.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the PO Commitment Mismatch Event

Buyer administrators can configure the PO Commitment Mismatch event. For example, you might want to receive an alert when any quantities or prices in the commitment are different from the purchase order.

Procedure

To define rules for the PO Commitment Mismatch event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator. The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the PO Commitment Mismatch event in the Configure Events panel.
4. Click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
5. Define the following alert settings:

Field	Description
Raise alert if committed date is <number> day(s) <number> hrs BEYOND requested date of any order line	Specify how late the commitment dates have to be to trigger the alert: 1. Define the alert tolerance as the number of days or hours that the committed date is allowed to be later than the requested date. 2. The system compares the committed date for each order line in the commitment to the requested date for that order line in the purchase order. 3. The system sends the alert if any of the committed dates are later than the tolerance you defined. For example, you might want the system to raise the alert when any of the committed dates is more than 24 hours later than the requested date for that line item in the purchase order.
Raise alert if committed date is <number> day(s) <number> hrs BEFORE requested date of any order line	Specify how early the commitment dates have to be to trigger the alert: 1. Define the alert tolerance as the number of days or hours that the committed date is allowed to be earlier than the requested date. 2. The system compares the committed date for each order line in the commitment to the requested date for that order line in the purchase order. 3. The system sends the alert if any of the committed dates are earlier than the tolerance you defined. For example, you might want the system to raise the alert when any of the committed dates is more than 48 hours earlier than the requested date for that line item in the purchase order.
Raise alert if committed quantity is <number>% UNDER order line quantity	You can track shortages in the commitment from the supplier. Sterling Supply Chain Visibility sends the alert if the committed quantity is a specified percentage below the requested quantity. For example, you might want the system to send the alert when the shortage in the committed quantity is at least 20% less than the requested order line quantity.

Field	Description
Raise alert if committed quantity is <number>% OVER order line quantity	You can track overages in the commitment from the supplier. Sterling Supply Chain Visibility sends the alert if the committed quantity is a specified percentage above the requested quantity. For example, you might want the system to send the alert when the overage in the committed quantity is at least 10% more than the requested order line quantity.
Raise alert if committed price is <number>% UNDER order line unit price	Sterling Supply Chain Visibility sends the alert if the committed price is a specified percentage below the requested price for an order line. For example, you might want the system to send the alert when the committed price for any order line is at least 30% less than the requested price.
Raise alert if committed price is <number>% OVER order line unit price	Sterling Supply Chain Visibility sends the alert if the committed price is a specified percentage above the requested price for an order line. For example, you might want the system to send the alert when the committed price for any order line is at least 5% more than the requested price.

6. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

7. Click **Save** to save your alert configuration.
8. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the PO Delayed Event

Buyer administrators can configure the PO Delayed event.

Procedure

To configure the PO Delayed event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.

3. Select the PO Delayed event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define the following alert setting:

Field	Description
Raise alert if order is delayed by <number> day(s) <number> hrs BEYOND expected ship or delivery date for any order line.	Enter the number of allowable days and hours beyond the expected ship or delivery date, within which the order should arrive. Sterling Supply Chain Visibility raises an alert if the number of days and hours by which the expected order is delayed exceeds the number of days and hours that you configure.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the PO Not Shipped Event

Buyer administrators can configure the PO Not Shipped event.

Procedure

To configure the PO Not Shipped event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the PO Not Shipped event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define the following alert setting:

Field	Description
Raise alert if shipment is not shipped <number> day(s) <number> hrs BEYOND expected ship date for any order line.	Enter the number of allowable days and hours beyond the expected ship date, within which the shipment can be shipped. Sterling Supply Chain Visibility raises an alert if the shipment is not shipped and the difference between the current time and the expected ship time is more than the number of days and hours that you configure.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

   Note: For an order line with multiple schedules, the alert is not raised for the next schedule until the ASN is sent for the complete committed quantity of the previous schedules.

Configuring the PO Rejected By Supplier Event

Buyer administrators can configure the PO Rejected by Supplier event. Your users can receive an alert when a purchase order is rejected.

Procedure

To configure the PO Rejected By Supplier event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the PO Rejected By Supplier event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

5. Click **Save** to save your alert configuration.

6. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the PO Short Event

Buyer administrators can configure the PO Short event.

Procedure

To configure the PO Short event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the PO Short event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define the following alert settings:

Table 53. PO Short Alert Configuration

Field	Description
Raise alert if shipment is not shipped <number> day(s) <number> hrs BEYOND expected ship date for any order line.	Enter the number of allowable days and hours beyond the expected ship date, within which the shipment is shipped. Sterling Supply Chain Visibility raises an alert if the shipment is short and the difference between the current date and the expected ship date is more than the number of days and hours that you configure.
Raise alert when ASN quantity is <number> % UNDER order line quantity.	Enter the allowable shortage percentage. Sterling Supply Chain Visibility raises an alert if the ASN quantity is below the last committed order line quantity by a percentage that is less than what you configure.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.

6. Click **Save** to save your alert configuration.

   Note: For an order line with multiple schedules, the alert is not raised for the next schedule until the ASN is sent for the entire committed quantity of the previous schedules.

Configuring the Shipment Delayed Event

Buyer administrators can configure the Shipment Delayed event.

Procedure

To configure the Shipment Delayed event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Shipment Delayed event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define the following alert setting:

Field	Description
Raise alert if shipment is delayed by <number> day(s) <number> hrs BEYOND its expected delivery date.	Enter the number of allowable days and hours beyond the expected delivery date, within which the order should arrive. Sterling Supply Chain Visibility raises an alert if the shipment is delayed and the difference between the current date time and the expected delivery date time is more than the number of days and hours that you configure.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Shipment Not Received Event

Buyer administrators can configure the Shipment Not Received event. Your users can receive an alert when a shipment has not been delivered by the expected date.

Procedure

To configure the Shipment Not Received event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator. The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Shipment Not Received event in the Configure Events panel.
4. Click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
5. You can define the following rule for the Shipment Not Received alert:

Field	Description
Raise alert if shipment has not shown up for <number> day(s) <number> hrs BEYOND expected delivery date	Specify how late a delivery must be before the alert is triggered: 1. Define the alert tolerance as the number of days or hours that the actual delivery is allowed to be later than the expected delivery date. 2. The system sends the alert if the shipment has not been delivered before this tolerance period expires. For example, you might want the system to send the alert 8 hours after the expected delivery time if the delivery has not occurred.

6. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

7. Click **Save** to save your alert configuration.
8. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Shipment Quantity Overage Event

Buyer administrators can configure the Shipment Quantity Overage event.

Procedure

To configure the Shipment Quantity Overage event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Shipment Quantity Overage event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define the following alert setting:

Field	Description
Raise alert when ASN quantity is <number>% OVER order line quantity	Enter the allowable overage percentage. Sterling Supply Chain Visibility raises an alert if the quantity received is more than the committed ASN quantity by a percentage more than what you configure.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Shipment Shipped Early Event

Buyer administrators can configure when the Shipment Shipped Early event is raised.

Procedure

To configure the Shipment Shipped Early event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Shipment Shipped Early event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define the following alert setting:

Field	Description
Raise alert if shipment is shipped <number> day(s) <number> hrs BEFORE requested ship date of any order line	Enter the allowable number of days and hours. Sterling Supply Chain Visibility raises an alert if the actual shipment date of the shipment occurs before the tolerance period that you configure.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Shipment Shipped Late Event

Buyer administrators can configure when the Shipment Shipped Late event is raised.

Procedure

To configure the Shipment Shipped Late event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Shipment Shipped Late event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define the following alert setting:

Field	Description
Raise alert if shipment is shipped <number> day(s) <number> hrs BEYOND requested ship date of any order line	Enter the allowable number of days and hours. Sterling Supply Chain Visibility raises an alert if the actual shipment date of the shipment exceeds the tolerance period that you configure.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Shipment Short Event

Buyer administrators can configure when the Shipment Short event is raised.

Procedure

To modify the rules for raising the Shipment Short event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Shipment Short event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.

4. Define the following alert settings:

Field	Description
Raise alert if shipment is not shipped <number> day(s) <number> hrs BEYOND expected ship date for any order line.	Enter the number of allowable days and hours beyond the expected ship date, within which the shipment should arrive. Sterling Supply Chain Visibility raises an alert if the difference between the current date time and the expected ship date time is more than the number of days and hours entered by you here.
Raise alert when ASN quantity is <number>% UNDER order line quantity.	Enter the allowable shortage percentage. Sterling Supply Chain Visibility raises an alert if the ASN quantity is below the last committed order line quantity by a percentage that is less than what you configure.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.
Notify alert via E-mail to Supplier	Sends the supplier an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Manual Events

A buyer can create a manual non-compliance event. You can enter the details of the discrepancy and generate a chargeback.

A manual recorded event is similar to a non-compliance event that is created by an XML file, which is generated by an external system. However, the buyer administrator or SRO manually enters the non-compliance information in Sterling Supply Chain Visibility.

For example, you might have situations that can only be detected manually at the buyer's physical location, such as incorrect labelling.

You can record discrepancies against a particular event by providing reference fields, such as a purchase order number, shipment number, or invoice number. The reference you enter must match with the corresponding event configuration.

For example, if the event is configured to generate a chargeback as a flat fee per order, you must specify the purchase order number as the reference field.

Recording a Manual Event

You can enter an event and use it to track discrepancies related to the event. This process is referred to as recording a manual event.

Procedure

To record manual events, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO).
2. Click **Alerts > Record Events**. The Record Events page is displayed.
3. Define the following field for each event that you want to record:

Table 54. Defining Record Event Fields

Field	**Description**
Event Name	Select the event you want to record. The event name is required.
Event Date	Enter the date the event was raised. You can also click the **Calendar Entry** icon to select the date.
Supplier ID	Enter the identifier of the supplier that you are tracking in the event. You can also click the **Look Up** icon to search for a Supplier ID and select that supplier. The Supplier ID is required.
User Comments	Enter any notes you want to use to describe the event. You can enter up to 4000 characters. **Note:** You cannot enter the % and + characters.

Table 54. Defining Record Event Fields (continued)

Field	Description
References	When you select an **Event Name**, the Record Events page shows the reference fields that are required for this event. Enter the values you want to track for each reference field. The required reference fields are based on the billing type of the event. For example: • If the event is configured to generate a chargeback as a *flat fee per order*, the purchase order number is the only reference required. • If the event is configured with the *% of labor charge* billing type, you must specify either the purchase order number or the shipment number. • If the event is configured with the *flat fee per order line* billing type or the *flat fee per shipment line* billing type, you must enter the purchase order number, shipment number, line identifier, quantity, and other references.

4. Click **Add Records** to add the event to the **Event** list.
5. Optional: To add more reference fields to an event, click the **Additional References** hyperlink. The Additional References panel opens on the Sterling as a Service Applications page.
6. Repeat steps 3 through 5 to add more events.

   Tips:
   - You can add up to 10 events at a time. If you want to add more than 10 events, click **Record Data** to save the first 10 events and then continue to add new events.
   - To delete an event, click the trash can icon for that entry in the **Event** list.
   - You can sort the recorded events in the **Event** list. For example, you might want to sort the events by the **Event Date**.
7. Click **Record Data** to record and save all the manually recorded events.
8. Click **OK** in the notification box to confirm that all events have been successfully recorded. You are returned to the Record Events page.

Searching for a Recorded Event

You can search for a manual event that you have recorded.

Procedure

To search for recorded events, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO).
2. Click **Alerts > Find Alert**. The Search Criteria panel is displayed on the Find Alert page.

3. Click **Find External Event**. The Search Criteria panel is displayed on the Find External Event page.
4. Enter the following search criteria for the events:

Table 55. Search Criteria for Find External Event Page

Field	Description
Event Name	Select the event you want to search for.
Event Date	Enter the date range you want to include in the search. The search will return any events that were raised during that date range. You can also click the **Calendar Entry** icon to select the date range.
Order #	Enter a purchase order number to find events that are related to that purchase order. You can also select one of the following options: • **is**: The search returns the exact value you entered. • **starts with**: The search returns all purchase order numbers that start with the entered value. • **contains**: The search returns all purchase order numbers that contain the entered value.
Shipment #	Enter a shipment number to find events that are related to that shipment. You can also select one of the following options: • **is**: The search returns the exact value you entered. • **starts with**: The search returns all shipment numbers that start with the entered value. • **contains**: The search returns all shipment numbers that contain the entered value.
Supplier ID	Enter a Supplier ID to find events that are related to that supplier. You can also select one of the following options: • **is**: The search returns the exact value you entered. • **starts with**: The search returns all Supplier IDs that start with the entered value. • **contains**: The search returns all Supplier IDs that contain the entered value.
Find Alert	Opens the Find Alert page, where you can search for alerts.
Max Records	Enter the maximum number of records to include in the search results. By default, **Max Records** is set to 30. The maximum value that you can enter is 500.

5. Click **Search**. The search results are displayed in the Listing panel:

Table 56. Search Results for Find External Event Page

Field	Description
Event Date	Shows the date the event was raised.
Event Name	Shows the event that was raised manually or raised by the system.
Order #	Shows the purchase order number that applies to the event. Click the **Order #** hyperlink to view the Purchase Order Detail page. The order number is displayed as a hyperlink if the purchase order exists in the system.
Shipment #	Shows the shipment number that applies to the event. Click the **Shipment #** hyperlink to view the Shipment Detail page. The shipment number is displayed as a hyperlink if the shipment exists in the system.
Supplier ID	Shows the supplier that applies to the event.

Adding References to a Recorded Event

A buyer can add additional reference fields to a manually recorded event.

Procedure

To add additional references to a manually recorded event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO).
2. Click **Alerts > Record Events**. The Record Events page is displayed.
3. Create a manually recorded event and click **Add Records** to add the event to the **Event** list.
4. Click the **Additional References** hyperlink for the event. The Sterling as a Service Applications page opens.
5. In the Additional References panel, click the **Add a Record** icon to add a new row.

   You can also enter a numeric value in the text box and click the **Add a Record** icon to add the corresponding number of new rows. To delete an additional reference that you just added, click the corresponding **Delete a Record** icon.
6. In the Data Type column, select **Currency**, **Date**, or **String**.
7. In the Name column, enter a name to describe the reference field.
8. In the Value column, enter an appropriate value for the reference field.
9. Click **Add** to add the references to the event and return to the Record Events page.
10. To delete a data type after you have added it to a manually recorded event, click the **Additional References** hyperlink for the event on the Record Events page. Select the check box for the data type and click **Delete**.

Chapter 20. Sterling Vendor Compliance Module

Buyer administrators can configure various parameters for the optional Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal module.

For example, you can configure the following features:
- Chargeback dispute period (also known as the mediation period)
- Chargeback publishing
- Export of chargeback details
- The grace period before chargeback is applied for new suppliers
- Chargeback reason codes

Each buyer must subscribe to the Vendor Compliance module. It is not part of the basic Sterling Supply Chain Visibility service.

The standard implementation for the Vendor Compliance module requires you to subscribe to both Sterling Supply Chain Visibility and Sterling Supplier Portal.

For more information about using the Vendor Compliance module and managing chargebacks, see the Sterling Supply Chain Visibility Buyer and Seller User Guides.

Supplier Relations Officer Role

The buyer administrator can set up a Supplier Relations Officer (SRO) user to manage the optional Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal module.

A buyer administrator can assign the SRO role to a new user or assign the SRO role to an existing user. SRO privileges are only available if the buyer organization's subscription type is set to **Inbound Visibility, with Alerts and Compliance**.

The SRO user and the buyer administrator can perform the following tasks in the Vendor Compliance module:

Supplier Relations Officer
- Configure enterprise-level Vendor Compliance preferences.
- Configure the grace period when adding suppliers during the on-boarding process.
- Configure the order-based and shipment-based events for Vendor Compliance.
- View and modify chargebacks.
- View the Non-Compliance summary.
- Modify an existing supplier profile. The SRO user cannot add or delete users.

The SRO user cannot export chargebacks to a third-party application.

Buyer Administrator
- Configure enterprise-level Vendor Compliance preferences.

- Configure the grace period when adding suppliers during the on-boarding process.
- Configure the order-based and shipment-based events for Vendor Compliance.
- View and modify chargebacks.
- View the Non-Compliance summary.
- Add, modify, or delete supplier profiles.
- Export chargebacks to a third-party application.

The following menu options are available to the SRO user:

- **Alerts Menu**: Find Alert, Manage Events, and Create Inbound Event
- **Reports Menu**: Configure Thresholds for Supplier Charts, Configure Tolerance for Supplier KPIs, and View Performance of Suppliers
- **Inbound Menu**: Find PO, Find Invoice, Find Shipment, Find Inventory, Find Chargeback, and Change PO Watch List Status
- **Administration Menu**: Manage Suppliers and Manage Compliance Preferences

Related tasks:

"Defining Vendor Compliance Preferences"
Buyer administrators and supplier relations officers can define the preferences for the optional Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal module.

Defining Vendor Compliance Preferences

Buyer administrators and supplier relations officers can define the preferences for the optional Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal module.

Procedure

To define your Vendor Compliance preferences, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO). The Dashboard is displayed.
2. Click **Administration > Manage Compliance Preferences**. The Compliance Preferences page is displayed.
3. Use the Chargeback Preferences panel to define how the system processes chargebacks:

Table 57. Chargeback Preferences Panel of Compliance Preferences Page

Field	Description
Allow a dispute period of <number> days before finalizing chargebacks and sending to external applications	Enter the number of days for the chargeback dispute period. When the period expires, the chargeback is marked as completed and is published to your external applications. Sterling Supply Chain Visibility uses the following rules to process the chargeback dispute period: • The dispute period can be up to 365 days. • The default dispute period is 30 days. • If you do not enter a value, the dispute period is zero days. • The business calendar is not considered when the system calculates chargeback dates. All calendar days are counted when the system processes chargebacks.
Publish finalized chargeback	Select this option if you want to publish the completed chargeback to your external applications.
Publish chargeback upon creation or modification	Select this option if you want to publish the chargeback to your external applications when the chargeback is created or changed.

4. Use the Chargeback Reason Codes panel to assign reason codes to the chargebacks:

Table 58. Chargeback Reason Codes Panel of Compliance Preferences Page

Field	Description
Reason Code	Shows the reason code that is assigned to the chargeback. After you assign a reason code to your compliance preferences, you cannot edit the actual reason code. If you want to change the reason code, you can delete that reason code and add a new one to replace it. To remove a reason code from your compliance preferences, select the reason code and click **Delete**.
Description	Shows the description of the reason code. You can edit the description.
Can be used for	Select one or both of the following check boxes: • **Modification**: The reason code will be available on the Modify Chargeback Amount page when you are changing the value of the chargeback. • **Cancellation**: The reason code will be available on the Cancel Chargeback page when you cancel a chargeback.

5. Click **Save** to save the preferences.

Related reference:

"Supplier Relations Officer Role" on page 109
The buyer administrator can set up a Supplier Relations Officer (SRO) user to manage the optional Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal module.

"Sending Chargebacks to External Applications"
You can use Sterling B2B Collaboration Network to configure the chargeback documents to be sent to your external applications.

Sending Chargebacks to External Applications

You can use Sterling B2B Collaboration Network to configure the chargeback documents to be sent to your external applications.

IBM sets up this configuration during the implementation phase. There are two options:

Publish chargeback upon creation or modification

You can have Sterling Supply Chain Visibility publish the created or modified chargeback XML files to your external applications.

Publish finalized chargeback

You can have Sterling Supply Chain Visibility publish the chargeback XML files to your external applications when the documents are marked as complete.

As requested by a customer, IBM can configure the chargeback transaction ID prefix with a prefix of up to three characters for an enterprise. To modify the chargeback transaction ID prefix, contact IBM Customer Support.

Related tasks:

"Defining Vendor Compliance Preferences" on page 110
Buyer administrators and supplier relations officers can define the preferences for the optional Sterling Vendor Compliance for Supply Chain Visibility and Supplier Portal module.

Creating an External Noncompliance XML Document

Buyer administrators can create an external noncompliance XML document and submit it to Sterling B2B Collaboration Network.

The noncompliance XML document that is routed to Sterling B2B Collaboration Network must contain the following attributes in the XML header:

- **Document type**: The value of this attribute must be EXTERNAL_EVENT.
- **Buyer Organization Code**: The EDI ID of the sender.
- **Vendor ID**: The EDI ID of the receiver.

For more information about routing XML documents to Sterling B2B Collaboration Network, see the *IBM Sterling B2B Collaboration Network Overview Guide* and the *IBM Sterling B2B Collaboration Network Communications Guide*.

Adding a Chargeback Reason Code

Buyer administrators can add a new chargeback reason code to Sterling Supply Chain Visibility.

Procedure

To add a chargeback reason code, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or an SRO. The Dashboard is displayed.
2. Click **Administration > Manage Compliance Preferences**. The Compliance Preferences page is displayed.
3. In the Chargeback Reason Codes panel, click the **Add a Record** icon to add a new row.

   You can also enter a numeric value in the text box, and click the **Add a Record** icon to add the corresponding number of new rows. To delete a chargeback reason code that you just added, click the **Delete a Record** icon.
4. In the Reason Code column, enter a name for the reason code. The reason code name is required and must be 30 characters or less.
5. In the Description column, enter a description for the reason code. The description is required and must be 40 characters or less.
6. In the Can be Used For column, select one or both of the following check boxes:
   - **Modification**: The reason code will be available on the Modify Chargeback Amount page when you are changing the value of the chargeback.
   - **Cancellation**: The reason code will be available on the Cancel Chargeback page when you cancel a chargeback.
7. Click **Save** to save the new chargeback reason code.

   Note: You cannot save a duplicate chargeback reason code. When you create a reason code, ensure that a reason code does not already exist with the same name. However, you can have more than one reason code that has the same reason code description.

Modifying the Description of a Chargeback Reason Code

Buyer administrators can modify the description of a chargeback reason code.

About this task

You can change the description for a chargeback reason code but you cannot change the actual reason code. Instead, you can delete the chargeback reason code and then add a new reason code.

Procedure

To modify a chargeback reason code, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or an SRO. The Dashboard is displayed.
2. Click **Administration > Manage Compliance Preferences**. The Compliance Preferences page is displayed.
3. Update the **Description**. The **Description** field is required and you cannot save your changes if the field is blank.
4. Optional: You can update the **Can Be Used For** settings. You can select **Modification** to change the chargeback amount, select **Cancellation** to cancel the chargeback, or both.
5. Click **Save**.

Deleting a Chargeback Reason Code

Buyer administrators can delete a chargeback reason code that their organization created.

Procedure

To delete a chargeback reason code, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or an SRO. The Dashboard is displayed.
2. Click **Administration > Manage Compliance Preferences**. The Compliance Preferences page is displayed.
3. Select the check box for the chargeback reason code you want to delete.
4. Click **Delete** to remove the selected chargeback reason code.

Chapter 21. Seller Administration

Seller administrators can configure their default customer preferences, customer profiles, and alerts in Sterling Supply Chain Visibility.

Sellers can configure the following capabilities in Sterling Supply Chain Visibility:
- Default Customer Preferences
- Customers
- Seller Alerts

In addition, both buyer and seller administrators can perform General Administration Tasks in Sterling Supply Chain Visibility.

Chapter 22. Configuring Default Customer Preferences

Sellers can configure default customer preferences. Sterling Supply Chain Visibility applies these preferences when it creates a profile for a new customer.

Before you begin

To configure default customer preferences, ensure that you subscribed during Sterling Supply Chain Visibility registration to monitor orders from your customers.

About this task

When a seller submits a transaction such as an acknowledgement or commitment, Sterling Supply Chain Visibility checks to see if the seller has created a customer profile for the buyer specified in the transaction. If no customer profile exists, Sterling Supply Chain Visibility automatically creates the profile. The system uses your default customer preferences to populate the new profile.

When you manually create a customer profile, Sterling Supply Chain Visibility does not apply the default customer preferences to the new profile. You define your own parameters for each customer profile.

Procedure

To configure default customer parameters, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator.
2. Click **Administration > Default Customer Preference**. The Customer Configuration panel is displayed on the Default Customer Parameters page. You can define the following fields:

Table 59. Default Customer Parameters

Field	Description
Expects Functional Acknowledgement	Select this option if the customer requires you to send a functional acknowledgement for each purchase order.
Functional Acknowledgement Time (Hrs)	Specify how much time you have to submit the acknowledgement after you receive the order. For example, enter **12** if your customer requires you to send the acknowledgement within 12 hours of receiving the purchase order.
Expects Commitment	Select this option if the customer requires you to send a commitment for each purchase order.

Table 59. Default Customer Parameters (continued)

Field	Description
Commitment Time (Hrs)	Specify how much time you have to submit the commitment after you receive the order. For example, enter **24** if your customer requires you to send the commitment within 24 hours of receiving the purchase order.
Expects ASN	Select this option if the customer requires you to send an ASN for each purchase order.

3. Click **Save**.

   Tip: Sellers can subscribe to the PO Functional Acknowledgment Not Sent alert, PO Commitment Not Sent alert, and the ASN Not Sent alert. Sterling Supply Chain Visibility sends these alerts if you do not submit the required documents in time.

Chapter 23. Managing Customers

Seller administrators can manage the customers (buyer organizations) they work with in Sterling Supply Chain Visibility.

To manage customers, ensure that you subscribed during Sterling Supply Chain Visibility registration to monitor orders from your customers.

Searching for Customers

Seller administrators can search for customer profiles for the buyers they work with in Sterling Supply Chain Visibility.

Procedure

To search for customers, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator.
2. Click **Administration > Manage Customers**. The Search Criteria panel is displayed on the Find Customer page.
3. Enter the following search criteria and click **Search**:

Table 60. Search Criteria for Find Customer Page

Field	Description
Organization Name	Enter the name of the customer you want to search for.
Customer ID	Enter the unique identifier of the customer you want to search for.
Max Records	Enter the maximum number of records to include in the search results. By default, **Max Records** is set to 30. The maximum value that you can enter is 500.

4. You can view the search results in the Listing panel of the Find Customer page:

Table 61. Search Results for Find Customer Page

Field	Description
Customer ID	Shows the unique identifier of the customer.
Customer Name	Shows the customer name.
Expects Functional Acknowledgement	Displays one of the following options: • **Y**: The customer is configured to receive functional acknowledgements. • **N**: The customer is not configured to receive functional acknowledgements.
Functional Acknowledgement Time (Hrs)	The number of hours within which the functional acknowledgement is sent to the customer, after receiving the order.

Table 61. Search Results for Find Customer Page (continued)

Field	Description
Expects Commitment	Displays one of the following options: • **Y**: The customer is configured to receive commitments. • **N**: The customer is not configured to receive commitments.
Commitment Time (Hrs)	The number of hours within which the commitment is sent to the customer, after receiving the order.
Expects ASN	Displays one of the following options: • **Y**: The customer is configured to receive ASN documents. • **N**: The customer is not configured to receive ASN documents.
City	Shows the city where the customer is located.

5. You can perform the following actions to manage your customers:

Table 62. Actions for Find Customer Page

Action	Description
Add	Opens the Add Customer page, where you can define a new customer profile.
Modify	Opens the Configure Customer page, where you can modify the customer profile you selected.
Delete	Deletes the selected customer.

Adding a Customer

Seller administrators can add a new customer profile to Sterling Supply Chain Visibility.

Procedure

To add a new customer, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator.
2. Click **Administration > Manage Customers**. The Search Criteria panel is displayed on the Find Customer page.
3. Enter the search criteria and click **Search**. A list of customers is displayed in the **Listing** panel of the Find Customer page.
4. Click **Add** to open the Add Customer page.
5. Define the fields on the Add Customer page.
6. Click **Save** to save the customer profile.

Customer Profile Entries

Seller administrators can define a customer profile when they add or modify a buyer organization in Sterling Supply Chain Visibility.

The Add Customer and Configure Customer pages contain the following panels:

- Customer Details Panel

- Customer Configuration Panel
- Customer's Additional EDI IDs

Customer Details Panel

Seller administrators can define the following fields on the Customer Details panel of the Add Customer and Configure Customer pages:

Field	Description
Customer Name	Enter the name of the customer.
Customer ID	Enter the identifier that uniquely identifies the customer. If you update a customer profile, you cannot change the Customer ID.
Qualifier/EDI ID	In the **Qualifier** box, enter the code that is used to designate the receiver ID element for the customer. In the **EDI ID** box, enter the Electronic Data Interchange (EDI) code for the customer. If you update a customer profile, you cannot change an existing qualifier or EDI ID.
Address Line 1	Enter the first address line of the customer.
Address Line 2	Enter the optional second address line of the customer.
Address Line 3	Enter the optional third address line of the customer.
City	Enter the city where the customer is located.
State	Enter the state or province where the customer is located.
Zip Code	Enter the postal code of the area where the customer is located.
Country	Enter the country or region where the customer is located.
Phone #	Enter the telephone number of the customer.
E-mail	Enter the email address of the customer.

Customer Configuration Panel

Seller administrators can define the following fields on the Customer Configuration panel of the Add Customer and Configure Customer pages:

Field	Description
Expects Functional Acknowledgement	Select this option if the customer requires you to submit a functional acknowledgement for each purchase order.
Functional Acknowledgement Time (Hrs)	Specify how much time you have to submit the acknowledgement after you receive the order. For example, enter **12** if the customer requires you to send the acknowledgement within 12 hours of receiving the purchase order.
Expects Commitment	Select this option if the customer requires you to submit a commitment for each purchase order.

Field	Description
Commitment Time (Hrs)	Specify how much time you have to submit the commitment after you receive the order. For example, enter **24** if the customer requires you to send the commitment within 24 hours of receiving the purchase order.
Expects ASN	Select this option if the customer requires you to submit an ASN for each purchase order.

Tip: Sellers can subscribe to the PO Functional Acknowledgment Not Sent alert, PO Commitment Not Sent alert, and the ASN Not Sent alert. Sterling Supply Chain Visibility sends these alerts if you do not submit the required documents in time.

Customer's Additional EDI IDs

Seller administrators can define the following fields on the Customer's Additional EDI IDs panel of the Add Customer and Configure Customer pages:

Field	Description
Qualifier	Enter the code that is used to designate the receiver ID element for the customer. If you update a customer profile, you cannot change an existing qualifier.
EDI ID	Enter the new EDI ID for the customer. If you update a customer profile, you cannot change an existing EDI ID.

Click the **Add a Record** icon to define new qualifiers and EDI IDs.

To remove an EDI identifier, select the EDI ID entry and click **Delete**.

Related tasks:

"Modifying a Customer"
Seller administrators can modify a customer profile in Sterling Supply Chain Visibility.

"Viewing Customer Details" on page 123
Seller administrators can view the details of a customer profile they created.

Modifying a Customer

Seller administrators can modify a customer profile in Sterling Supply Chain Visibility.

Procedure

To modify a customer, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator.
2. Click **Administration > Manage Customers**. The Search Criteria panel is displayed on the Find Customer page.
3. Enter the search criteria and click **Search**. A list of customers is displayed in the Listing panel of the Find Customer page.

4. Select the check box for the **Customer ID** of the customer you want to update.
5. Click **Modify** to open the Configure Customer page.
6. Update the fields on the Configure Customer page.
7. Click **Save** to save your changes to the customer profile.

   Note: You cannot change the **Customer ID** and **Customer Name** when you update a customer profile.

Related reference:

"Customer Profile Entries" on page 120
Seller administrators can define a customer profile when they add or modify a buyer organization in Sterling Supply Chain Visibility.

Deleting a Customer

Seller administrators can delete a customer profile from Sterling Supply Chain Visibility.

Procedure

To delete a customer, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator.
2. Click **Administration > Manage Customers**. The Search Criteria panel is displayed on the Find Customer page.
3. Enter the search criteria and click **Search**. A list of customers is displayed in the Listing panel of the Find Customer page.
4. Select the **Customer ID** check box for the customer you want to delete.
5. Click **Delete** to remove the selected customer.

Viewing Customer Details

Seller administrators can view the details of a customer profile they created.

Procedure

To view the details of a customer profile, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator.
2. Click **Administration > Manage Customers**. The Search Criteria panel is displayed on the Find Customer page.
3. Enter the search criteria and click **Search**. A list of customers is displayed in the Listing panel of the Find Customer page.
4. Click the **Customer ID** hyperlink for the customer you want to work with. The Configure Customer page is displayed.
5. View or update the fields on the Configure Customer page.
6. Click **Save** to save your changes to the customer profile.

Related reference:

"Customer Profile Entries" on page 120
Seller administrators can define a customer profile when they add or modify a buyer organization in Sterling Supply Chain Visibility.

Adding EDI Identifiers for Customers

Seller administrators can add EDI identifiers for customers.

Procedure

To add EDI identifiers for customers, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator.
2. Click **Administration > Manage Customers**. The Search Criteria panel is displayed on the Find Customer page.
3. Enter the search criteria and click **Search**. A list of customers is displayed in the Listing panel of the Find Customer page.
4. In the Customer's Additional EDI IDs panel, click the **Add a Record** icon to add new qualifiers and EDI IDs. A new row appears.
5. Enter the **Qualifier ID** and **EDI ID**.
6. To delete an EDI ID that you just added, click the **Delete a Record** icon.
7. Click **Save**.

Chapter 24. Alerts for Sellers

Sellers can subscribe to a wide range of alerts in Sterling Supply Chain Visibility. Sellers can use these alerts to track issues in their shipping operations.

As the seller administrator, you can configure *events* in Sterling Supply Chain Visibility. For example, the system can check to make sure that the quantities and prices in your commitments match the quantities and prices the buyer requested in the purchase order.

When exceptions occur in the supply chain workflow, Sterling Supply Chain Visibility sends *alerts* to your users.

Users can view the alerts on the Sterling Supply Chain Visibility Dashboard or receive an email.

You can also set up Sterling Supply Chain Visibility to generate an XML file for an alert. You can export these alert files to a third-party application. For more information about this process, contact IBM Customer Support.

Configuring the Customer PO Commitment Not Sent Event

Seller administrators can configure the Customer PO Commitment Not Sent event.

Procedure

To configure the Customer PO Commitment Not Sent event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator. The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Customer PO Commitment Not Sent event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.

5. Click **Save** to save your alert configuration.
6. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Customer PO Functional Acknowledgment Not Sent Event

Seller administrators can configure the Customer PO Functional Acknowledgment Not Sent event.

Procedure

To configure the Customer PO Functional Acknowledgment event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator. The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Customer PO Functional Acknowledgment Not Sent event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.

5. Click **Save** to save your alert configuration.
6. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Invoice with Invalid Customer PO Event

Seller administrators can configure the Invoice with Invalid Customer PO event. Your users can receive an alert when you send an invoice that is not associated with a valid customer purchase order.

Procedure

To configure the Invoice with Invalid Customer PO event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator. The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Invoice With Invalid Customer PO event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.

5. Click **Save** to save your alert configuration.
6. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Customer PO Commitment Mismatch Event

Seller administrators can configure the Customer PO Commitment Mismatch event. For example, you might want to receive an alert when any quantities or prices in the commitment are different from the purchase order.

Procedure

To define rules for the Customer PO Commitment Mismatch event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator. The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Customer PO Commitment Mismatch event in the Configure Events panel.
4. Click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
5. Define the following alert settings:

Field	Description
Raise alert if committed date is <number> day(s) <number> hrs BEYOND requested date of any order line	Specify how late the commitment dates have to be to trigger the alert: 1. Define the alert tolerance as the number of days or hours that the committed date is allowed to be later than the requested date. 2. The system compares the committed date for each order line in the commitment to the requested date for that order line in the purchase order. 3. The system sends the alert if any of the committed dates are later than the tolerance you defined. For example, you might want the system to raise the alert when any of the committed dates is more than 24 hours later than the requested date for that line item in the purchase order.

Field	Description
Raise alert if committed date is <number> day(s) <number> hrs BEFORE requested date of any order line	Specify how early the commitment dates have to be to trigger the alert: 1. Define the alert tolerance as the number of days or hours that the committed date is allowed to be earlier than the requested date. 2. The system compares the committed date for each order line in the commitment to the requested date for that order line in the purchase order. 3. The system sends the alert if any of the committed dates are earlier than the tolerance you defined. For example, you might want the system to raise the alert when any of the committed dates is more than 48 hours earlier than the requested date for that line item in the purchase order.
Raise alert if committed quantity is <number>% UNDER order line quantity	You can track shortages in the commitment line items. Sterling Supply Chain Visibility sends the alert if the committed quantity is a specified percentage below the requested quantity. For example, you might want the system to send the alert when the shortage in the committed quantity is at least 20% less than the requested order line quantity.
Raise alert if committed quantity is <number>% OVER order line quantity	You can track overages in the commitment line items. Sterling Supply Chain Visibility sends the alert if the committed quantity is a specified percentage above the requested quantity. For example, you might want the system to send the alert when the overage in the committed quantity is at least 10% more than the requested order line quantity.
Raise alert if committed price is <number>% UNDER order line unit price	Sterling Supply Chain Visibility sends the alert if the committed price is a specified percentage below the requested price for an order line. For example, you might want the system to send the alert when the committed price for any order line is at least 30% less than the requested price.

Field	Description
Raise alert if committed price is <number>% OVER order line unit price	Sterling Supply Chain Visibility sends the alert if the committed price is a specified percentage above the requested price for an order line. For example, you might want the system to send the alert when the committed price for any order line is at least 5% more than the requested price.

6. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.

7. Click **Save** to save your alert configuration.
8. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Customer PO Delayed Event

Seller administrators can configure the Customer PO Delayed event.

Procedure

To configure the Customer PO Delayed event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator. The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Customer PO Delayed event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define the following alert setting:

Field	Description
Raise alert if order is delayed by <number> day(s) <number> hrs BEYOND expected ship or delivery date for any order line	Enter the number of allowable days and hours beyond the expected ship or delivery date, within which the shipment should be delivered. Sterling Supply Chain Visibility raises an alert if the number of days and hours by which the expected customer purchase order is delayed, exceeds the number of days and hours entered by you here.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Shipment Quantity Short Event

Seller administrators can configure the Shipment Quantity Short event.

Procedure

To configure the Shipment Quantity Short event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator. The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Shipment Quantity Short event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define the following alert settings:

Field	Description
Raise alert if shipment is not shipped <number> day(s) <number> hrs BEYOND expected ship date for any order line	Enter the number of allowable days and hours beyond the expected ship date, within which the shipment should be delivered. Sterling Supply Chain Visibility raises an alert if the difference between the current date and the expected ship date is more than the number of days and hours entered by you here and the quantity shipped is less than the allowable shortage percentage.
Raise alert when ASN quantity is <number>% UNDER order line quantity.	Enter the allowable shortage percentage. Sterling Supply Chain Visibility raises an alert if the ASN quantity is below the last committed order line quantity by a percentage less than what you configure.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Configuring the Shipment Not Delivered Event

Seller administrators can configure the Shipment Not Delivered event.

Procedure

To configure the Shipment Not Delivered event, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a seller administrator. The Dashboard is displayed.
2. Click **Alerts > Manage Events**. The Configure Events panel is displayed on the Manage Events page.
3. Select the Shipment Not Delivered event from the Configure Events panel, and click **Modify** in the Event Summary panel. The Sterling as a Service Applications page is displayed.
4. Define the following alert setting:

Field	Description
Raise alert if shipment has not been delivered <number> day(s) <number> hrs BEYOND its expected delivery date	Enter the number of allowable days and hours beyond the expected delivery date, within which the shipment should be delivered. Sterling Supply Chain Visibility raises an alert if the shipment is not delivered and the difference between the current date and the expected delivery date is more than the number of days and hours that you configure.

5. Define how you want Sterling Supply Chain Visibility to send the alert. You can select one or more options:

Field	Description
Notify via XML	Sends the alert in XML format. You can export the XML file to a third-party application.
Notify alert via E-mail	Sends your users an email when the alert is raised.

6. Click **Save** to save your alert configuration.
7. If the alert is not active, click the **Activate Now** link in the Event Summary panel.

Chapter 25. Configuring Supply Chain Visibility Reports

Buyer and seller administrators can set up and run reports in Sterling Supply Chain Visibility.

Buyer and seller administrators can configure the following reports:
- Key Performance Indicator (KPI) reports
- Outlier Data, which is used to track supplier and customer performance
- Interface Summary Report
- Error Summary Report
- Interface Error Details Report
- Sterling Business Intelligence reports

Key Performance Indicators

Buyers and sellers can use key performance indicators (KPIs) to measure their supply chain lifecycle and the performance of their trading partners.

For example:
- A buyer can use KPI metrics to measure whether their suppliers are submitting PO acknowledgements, commitments, and advanced ship notices on time.
- A seller can use KPI metrics to measure whether their customers are receiving shipments on time.

Configuring KPIs Thresholds

Buyer and seller administrators can configure KPI thresholds.

Before you begin

To configure KPI thresholds, ensure that you subscribed during Sterling Supply Chain Visibility registration to monitor orders to your supplier or customers.

Procedure

To configure KPI thresholds, follow these steps:
1. Log in to Sterling Supply Chain Visibility as a buyer administrator, seller administrator, or supplier relations officer (SRO).

   Note: The SRO user is authorized to only configure the thresholds for the supplier charts.
2. From the menu bar, select one these options:
   - Buyers can click **Reports > Configure Thresholds for Supplier Charts**. The Configure Thresholds for Supplier Charts page is displayed.
   - Sellers can click **Reports > Configure Thresholds for Customer Charts**. The Configure Thresholds for Customer Charts page is displayed.
3. Select the KPI that you want to configure and define the following settings:

Table 63. Configure Thresholds for Supplier Charts

Field	Description
Description	Enter the name of the report.
Supports Charts	Shows whether you can view a KPI as a chart: • **Yes**: You can view the KPI as a chart. • **No**: You cannot view the KPI as a chart.
High Value Threshold	Enter the high value threshold for the KPI. The KPI data is considered to be above average if the value displayed in the report is greater than the high value threshold. These values are highlighted in the reports.
UOM	Enter the unit of measure for the high value threshold.
Low Value Threshold	Enter the low value threshold for the KPI. The KPI data is considered to be below average if the value displayed in the report is less than the low value threshold. These values are highlighted in the reports.
UOM	Enter the unit of measure for the low value threshold.

4. Click **Save** to save the KPI thresholds.

Configuring KPI Tolerance

KPI tolerance is the buffer value that you configure for receiving Electronic Data Interchange (EDI) documents, shipments, and invoices. This tolerance value is beyond the value configured by the supplier for raising alerts.

Before you begin

To configure KPI tolerances, ensure that you subscribed during Sterling Supply Chain Visibility registration to monitor orders to your supplier or customers.

About this task

The documents might be received after the expected date or the number of days configured by the buyer as acceptable. However, they are still considered to be acceptable for the KPI if they are received within the KPI tolerance time. Similarly, the quantity received in shipments might be considered to be acceptable for the KPI, even when it does not equal the expected quantity or the supplier-configured quantity, if the received quantity lies within the KPI tolerance value.

For example, if the configured PO Acknowledgement time for a supplier is one day, and the tolerance configured by you is one day, it is acceptable to receive the PO acknowledgement two days after placing the order.

Procedure

To configure the KPI tolerance, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator, seller administrator, or supplier relations officer (SRO).

Note: The SRO user is authorized to only configure the tolerance for the supplier KPIs.

2. From the menu bar, buyers and sellers can select one of the following options:

   Buyers can click **Reports > Configure Tolerance for Supplier KPIs**. The Configure Tolerance for Supplier KPIs page is displayed. You can enter the following KPI tolerances:

Table 64. Configure Tolerance for Supplier KPIs

Field	**Description**
PO Acknowledgement Tolerance <number> Hours	Enter the number of hours for the PO Acknowledgement Tolerance. The PO Acknowledgement is considered to be received on time if the difference between the expected and the actual PO Acknowledgement receipt date is less than or equal to the tolerance entered here.
PO Commit Tolerance <number> Hours	Enter the number of hours for the PO Commit Tolerance. The PO Commit is considered to be received on time if the difference between the expected and the actual PO Commit receipt time is less than or equal to the tolerance entered here.
Commit Mismatch Tolerance <number> Days	Enter the number of days for the Commit Mismatch Tolerance. The Commitment is considered to be received on time if the difference between the expected and the actual Commitment receipt date is less than or equal to the tolerance entered here.
ASN Tolerance <number> Hours	Enter the number of hours for the ASN Tolerance. The ASN is considered to be received on time if the difference between the ASN date and the ship date is less than or equal to the tolerance entered here.
Ontime Shipment Tolerance <number> Days	Enter the number of days for the On Time Shipment Tolerance. The shipment is considered to be received on time if the difference between the expected and the actual shipment receipt date is less than or equal to the tolerance entered here.
Invoice Fill Rate Tolerance <number> %	Enter the percentage of an order that should be invoiced to compute the Invoice Cycle Time. The Invoice Cycle Time is the total number of days taken to invoice the percentage entered here.

Sellers can click **Reports > Configure Tolerance for Customer KPIs**. The Configure Tolerance for Customer KPIs page is displayed. You can enter the following KPI tolerances:

Table 65. Configure Tolerance for Customer KPIs

Field	Description
PO Acknowledgement Tolerance <number> Hours	Enter the number of hours for the Customer PO Acknowledgement Tolerance. The Customer PO Acknowledgement is considered to be received on time if the difference between the expected and the actual Customer PO Acknowledgement receipt date is less than or equal to the tolerance entered here.
PO Commit Tolerance <number> Hours	Enter the number of hours for the Customer PO Commit Tolerance. The Customer PO Commit is considered to be received on time if the difference between the expected and the actual Customer PO Commit receipt time is less than or equal to the tolerance entered here.
Commit Mismatch Tolerance <number> Days	Enter the number of days for the Customer Commit Mismatch Tolerance. The Customer Commitment is considered to be received on time if the difference between the expected and the actual Commitment receipt date is less than or equal to the tolerance entered here.
ASN Tolerance <number> Hours	Enter the number of hours for the Customer ASN Tolerance. The Customer ASN is considered to be received on time if the difference between the ASN date and the ship date is less than or equal to the tolerance entered here.
Ontime Shipment Tolerance <number> Days	Enter the number of days for the Customer On Time Shipment Tolerance. The shipment is considered to be received on time if the difference between the expected and the actual shipment receipt date is less than or equal to the tolerance entered here.
Invoice Fill Rate Tolerance <number> %	Enter the percentage of an order that should be invoiced to compute the Invoice Cycle Time. The Invoice Cycle Time is the total number of days taken to invoice the percentage entered here.

3. Click **Save** to save the KPI tolerances.

Configuring KPI Criteria

Buyer and seller administrators can define the KPI criteria, which control the display of the performance reports and charts.

Procedure

To enter the KPI criteria, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator, seller administrator, or an SRO user.
2. From the menu bar, select one these options:
   - Buyers can click **Reports > View Performance of Suppliers**. The View Performance of Suppliers page is displayed.
   - Sellers can click **Reports > View Performance by Customers**. The View Performance by Customers page is displayed. The SRO is not authorized to view the View Performance by Customers page.
3. Click the KPI or report that you want to view.
4. For Buyer administrators and SRO users, the Inbound KPIs page is displayed. The actions and fields on this page are described in the following tables:

Table 66. Actions for Inbound KPIs, Buyer View

Action	Description
Related Tasks	Click **Related Tasks** to perform additional tasks related to the KPI. You can perform the following tasks: • **Manage Supplier Groups**: View, modify, or delete the supplier groups. • **Add Supplier Group**: Define a new supplier group. **Note:** The Manage Supplier Groups and the Add Supplier Group tasks are not available for the Non-Compliance Summary report.
Configure KPI Outlier Data	Click this option to configure outlier data for the KPI.

Table 67. Preferences for Inbound KPIs, Buyer View

Field	Description
KPI should be run for	Choose the suppliers that you want to include in the report. You can select one of the following options: • **All Suppliers**: View the details of all the suppliers. • **Specific Supplier**: View the details of a specific supplier. Enter the Supplier ID in the check box. You can also click the **Look Up** icon to search for a specific supplier. • **Group of Suppliers**: View the details of a specific supplier group. Select the supplier group from the list.

Table 67. Preferences for Inbound KPIs, Buyer View (continued)

Field	Description
Restrict To Location List	Select the check boxes for the locations you want to include in the report. If you do not check any box, the report is generated for all locations.
Include Outlier Data	Select this check box to include all data when calculating the KPI, including the outlier data for specific orders or shipments.
For period of <period>	Select the time frame for which you want to generate the report or chart from the list. If you select the **Custom** option from the list, enter the date range for generating the report. You can also click the **Calendar Entry** icon to select the date range.
View Report	Choose whether you want to view a detailed report or a summarized chart. You can select one of the following options: • **View Detail Report**: View the KPI as reports. **As HTML**: View the report in HTML format. **As CSV**: View the report in CSV format. • **In Summary as a Chart**: View the KPIs as charts. The Chart Options area displays. **Show data in intervals of** Select the time interval for which you want to view the chart. **Compare performance** Select this check box to compare the performances against one of the following options: • **All Suppliers**: Compare the performances of all suppliers. • **Specific Supplier** : Compare the performance of a specific supplier. Enter the Supplier ID in the box. You can also click the **Look Up** icon to search for a specific supplier. • **Group of Suppliers**: Compare the performance of a group of suppliers. Select the supplier group from the list.

5. For supplier administrators, the Preferences for Outbound KPIs page is displayed. The actions and fields on this page are described in the following tables:

Table 68. Actions for Outbound KPIs, Supplier view

Action	**Description**
Related Tasks	Click **Related Tasks** to perform additional tasks related to the KPI. You can perform the following tasks: • **Manage Customer Groups**: View, modify, or delete the customer groups. • **Add Customer Group**: Define a new customer group.
Configure KPI Outlier Data	Click this option to configure outlier data for the KPI.

Table 69. Preferences for Outbound KPIs, Supplier view

Field	**Description**
KPI should be run for	Choose the customers that you want to include in the report. You can select one of the following options: • **All Customers**: View the details of all the customers. • **Specific Customer**: View the details of a specific customer. You can also click the **Look Up** icon to search or the specific customer. • **Group of Customers**: View the details of a specific customer group. Select the customer group from the list.
Include Outlier Data	Select this check box to include all data when calculating the KPI, including the outlier data for specific orders or shipments.
For period of <period>	Select the time frame for which you want to generate the report or chart from the list. If you select the Custom option from the list, enter the date range for generating the report. You can also click the **Calendar Entry** icon to select the date range.

Table 69. Preferences for Outbound KPIs, Supplier view (continued)

Field	Description
View Report	Choose whether you want to view a detailed report or a summarized chart. You can select one of the following options: • **View Detail Report**: View the KPI as reports. **As HTML**: View the report in HTML format. **As CSV**: View the report in CSV format. • **In Summary as a Chart**: View the KPIs as charts. The Chart Options area displays. **Show data in intervals of** Select the time interval for which you want to view the chart from the list. **Compare Performances** Select this check box to compare the performances against one of the following options: • **All Customers**: Compare performance against all customers. • **Specific Customer** : Compare performance against a specific customer. Enter the Customer ID in the box. You can also click the **Calendar Entry** icon to search for a specific customer. • **Group of Customers**: Compare performance of a group of customers. Select the customer group from the list.

6. Enter the required KPI criteria and select one of the following options:
   - **Save**: Save the KPI criteria settings.
   - **View Report**: View the KPI report or chart.

Configuring Outlier Data for Buyers

Buyer administrators can define the outlier data when they run a supplier KPI report.

Procedure

To define the outlier data when you run supplier KPI reports, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer administrator or supplier relations officer (SRO).
2. Click **Reports > View Performance of Suppliers**. The View Performance of Suppliers page is displayed.

3. Click the KPI or report you want to view. The Preferences for Inbound KPIs page is displayed.
4. Click **Configure KPI Outlier Data**. The Sterling as a Service Applications page is displayed. The fields on this page are described in the following table:

Table 70. Configure KPI Outlier Data for Buyers

Field	Description
Order #	Shows the outlier order number.
Enterprise Code	Shows the unique identifier of the enterprise to which the outlier order number.
Supplier	Shows the identifier of the supplier.

5. To add an order, click **Add Order**. The Sterling as a Service Applications page is displayed.
   - In the Search Criteria panel, enter the search criteria.
   - Click **Search**. The result of the search is displayed in the Listing panel.
   - Click the **Check** icon for the order number you want to include.
6. To delete an order, select the check box for the order number and click **Delete Order**.

Configuring Outlier Data for Sellers

Seller administrators can define the outlier data when they run a customer KPI report.

Procedure

To define the outlier data when you run customer KPI reports, follow these steps:
1. Log in to Sterling Supply Chain Visibility as a seller administrator.
2. Click **Reports > View Performance by Customers**. The View Performance by Customers page is displayed.
3. Click the KPI or report you want to view. The Preferences for Outbound KPIs page is displayed.
4. Click **Configure KPI Outlier Data**. The Sterling as a Service Applications page is displayed. The fields on this page are described in the following table:

Table 71. Configure KPI Outlier Data for Sellers

Field	Description
Order #	Shows the outlier customer order number.
Enterprise Code	Shows the unique identifier of the enterprise to which the outlier order number belongs.
Buyer ID	Shows the identifier of the buyer.

5. To add an order, click **Add Order**. The Sterling as a Service Applications page is displayed.
   - In the Search Criteria - Customer Order panel, enter the search criteria.
   - Click **Search**. The result of the search is displayed in the Listing panel.
   - Click the **Check** icon for the order number you want to include.
6. To delete an order, select the check box for the order number and click **Delete Order**.

Viewing the Interface Summary Report

Buyer and seller administrators can view the Interface Summary report in Sterling Supply Chain Visibility.

Procedure

To view the Interface Summary report, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator. The Dashboard is displayed.
2. Click **Reports > View Interface Summary**. The View Interface Summary page is displayed. By default, this page displays interface summary information for the documents that were processed during the past seven days.
3. Define your report criteria on the Filter Criteria panel:
   a. From the **Period** list, select the number of days (in the past), for which you want to view interface summary information.
   b. Select the documents for which you want to view interface summary information.

Table 72. Filter Criteria for the Interface Summary Report

Field	Description
Period	Select the time period for which you want to the view the interface summary information: • **Last 7 days**: This is the default time period. Select this option to view the interface summary details for all documents that were processed during the past seven days. • **Last 31 days**: View the interface summary information for all documents that were processed during the past 31 days • **Last 91 days**: View the interface summary information for all documents that were processed during the past 91 days. • **Last 181 days**: View the interface summary information for all documents that were processed during the past 181 days. **Note:** When you select **Last 181 days**, you cannot select more than three documents to view the interface summary.

Table 72. Filter Criteria for the Interface Summary Report (continued)

Field	Description
Document List	Select the documents for which you want to view the interface summaries: • Create Order • Acknowledge Order • Commit Order • Change Order • Recommit Order • In-transit Update • ASN • Invoice • Payment • Milestone Update • Supplier Update • Carrier Update **Note:** When a document is received for a payment or invoice, it refers to a single interface message, which might contain more than one logical transaction.

4. Click **Apply**. The Interface Summary - Chart panel and Interface Summary - Data panel are refreshed to display interface information for the documents you selected in Step 3. The documents are sorted by the date on which the transaction was processed. For field descriptions, see the following tables:

Table 73. Interface Summary - Chart Panel

Field	Description
Date	Shows the date on which the document was processed.
Error percent	Shows the percentage of documents that failed processing.
For each document, the graph displays: • The documents that were processed within the specified time period. • The percentage that failed processing on a particular date is plotted as a data point in the graph.	

Table 74. Interface Summary - Data Panel

Field	Description
Date	Shows the date the document was processed.
Document	Shows the document that was processed within the selected time period. Click the hyperlink for the document to open the Error Summary page.
Attempted	Shows the total number of documents that were processed.
Passed	Shows the number of documents that were processed successfully.

Table 74. Interface Summary - Data Panel (continued)

Field	Description
Failed	Shows the number of documents that failed processing.
% Failed	Shows the percentage of the documents that failed processing.

5. When you are done viewing the Interface Summary report, select another menu option to continue working in Sterling Supply Chain Visibility.

Viewing the Error Summary Report

Buyer and seller administrators can view the Error Summary report in Sterling Supply Chain Visibility.

Procedure

To view the Error Summary report, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator. The Dashboard is displayed.
2. Click **Reports > View Interface Summary**. The View Interface Summary page is displayed. By default, this page displays interface summary information for the documents that were processed during the past seven days.
3. Define your report criteria on the Filter Criteria panel:
   a. From the **Period** list, select the number of days (in the past), for which you want to view interface summary information.
   b. Select the documents for which you want to view interface summary information.
4. Click **Apply**. The Interface Summary - Chart panel and Interface Summary - Data panel are refreshed to display interface information for the documents you selected in Step 3. The documents are sorted by the date on which the transaction was processed.
5. In the Interface Summary - Data panel, click the hyperlink for a document to view the error summary. The Error Summary page is displayed.
6. You can view the following information on the Error Summary panel of the Error Summary page:

Table 75. Error Summary Panel of Error Summary Page

Field	Description
Summary of Document <document name> for date <date>	Shows the document that was processed, and the date on which it was processed.
Passed	Shows the number and percentage of documents that were processed successfully.
Failed	Shows the number and percentage of documents that failed processing.
Total	Shows the total number of documents that were processed.

7. You can view the following information on the Error Code List panel of the Error Summary page:

Table 76. Error Code List Panel of Error Summary Page

Field	Description
Error	Shows the error code and provides a short description of the error that occurred when the document was being processed.
Explanation	Shows the detailed explanation of the error that occurred when the document was being processed.
Failed	Shows the number of documents that failed processing because of the error. Click the hyperlink for a document to open the Find Interface Error page.

8. When you are done viewing the Error Summary report, select another menu option to continue working in Sterling Supply Chain Visibility.

Viewing the Interface Error Details Report

Buyer and seller administrators can run the Interface Error Details report. The report covers documents that have been processed in the past 41 days.

About this task

You can open the Interface Error Details report by clicking **Find Interface Error** on the **Reports** menu.

You can also open the Interface Error Details report by first opening the Error Summary report from the **Reports** menu. From the Error Summary report, click the **Error ID** hyperlink for an error to open the Interface Error Details report.

Procedure

To view the Interface Error Details report, follow these steps:

1. Log in to Sterling Supply Chain Visibility as a buyer or seller administrator. The Dashboard is displayed.
2. Click **Reports > Find Interface Error**. The Search Criteria panel is displayed on the Find Interface Error page.
3. Enter the following search criteria and click **Search**:

Table 77. Search Criteria for Find Interface Error Page

Field	Description
Error Code	Enter the error code identifier you want to search for.
Date	Enter a date and time range to search for errors that occurred during that range. You can also click the **Calendar Entry** icon to select a date range. You can also click the **Time Entry** icon to select a time range.
Document Type	Select whether you want to search for **Inbound** or **Outbound** documents.

Table 77. Search Criteria for Find Interface Error Page (continued)

Field	Description
Supplier ID or Customer ID	Enter a **Supplier ID** or **Customer ID** to find the following errors: • Documents that are submitted or received by a single supplier • Documents that are submitted or received by a single customer You can also click the **Look Up** icon to search for a supplier or customer.
Reference	You can search for an error based on an additional reference attribute that is associated with a document. Select the reference attribute and enter the value to filter your search using that value.
Document Types	Choose the **Select All** check box to include all the documents in the search. You can also select specific documents to view error details for only those documents. For example, you might want to view error details for the **Change Order**, **Commit Order**, or **ASN** entries.

4. You can view the search results in the Listing panel of the Find Interface Error page:

Table 78. Search Results for Find Interface Error Page

Field	Description
Error ID	Shows the identifier for each instance of the error. For example: • Sterling Supply Chain Visibility processes multiple Create Order documents. • Error code YDB100123 occurs 15 times for the Create Order documents. • The **Error ID** record displays the identifier for every instance of the error.
Document	Shows the document in which the error occurred.
Supplier ID or Customer ID	Shows the organization that submitted or received the document.
Date	Shows the date and time the error occurred.
Error Code	Shows the error code that occurred during the processing of the document.
Reference(s)	Shows any reference attributes that are associated with a failed document.

5. Select an error and click **View Details** to open the Error Details page. The Error Details page displays the following fields:

Table 79. Error Fields on Error Details Page

Field	Description
Error ID	Shows the identifier for each instance of the error.
Error Code	Shows the error code that occurred during the processing of the document.
Error Description	Shows a short description of the error.
Date	Shows the date the error occurred.
Reference(s)	Shows any reference attributes that are associated with a failed document.
Explanation	Shows a detailed description of the error.

6. You can use the Input XML panel of the Error Details page to view the input data for the failed document.
7. To copy the XML to your computer, click **Copy Stack Trace to Clipboard**. You can paste the stack trace data into the text editor of your choice.
8. When you are done viewing the Interface Error Details report, select another menu option to continue working in Sterling Supply Chain Visibility.

Configuring Sterling Business Intelligence

Sterling Business Intelligence adds value to the Sterling Supply Chain Visibility application by providing advanced reporting and ad hoc query capabilities.

The Sterling Business Intelligence (SBI) application contains data marts for Sterling Supply Chain Visibility.

As your company's administrator for Sterling Supply Chain Visibility, you have access to Sterling Business Intelligence. You can add access for other users in your company.

Sample Reports

Sterling Business Intelligence provides the following sample reports:

- PO Line Volume Report: Displays the total count of purchase order lines that are processed each month for your enterprise.
- Supplier On Time Shipment Summary Report: Displays the on- time shipment performance for your suppliers.

You can run these reports to analyze your organization's supply chain workflow. You can also use the reports as templates to develop your own custom reports.

Cognos Documentation

The Sterling Business Intelligence ad hoc reporting system uses Cognos Query Studio to create the queries that guide your analysis. For more information on using Query Studio, refer to the Cognos online help.

Updating Sterling Business Intelligence Passwords

To update their credentials, users log in to Sterling Customer Center and then open the IBM Sterling Business Intelligence application.

About this task

The user has to update the password in the Cognos reporting system if the password expires in Sterling Customer Center.

When users manually change their passwords in Sterling Customer Center, they are also required to update the reporting password in Cognos.

Procedure

To update the changed or expired password in Cognos, follow these steps:

1. Log in to Sterling Customer Center and select the IBM Sterling Business Intelligence application.
2. From the **My Area** option, open **My Preferences**.
3. Select the **Personal** tab and then click the **Renew the credentials** link.
4. The system prompts the user to enter the updated password for that user account. A confirmation message is displayed to show that the credentials were updated correctly.

Chapter 26. Troubleshooting

Use the following troubleshooting information to resolve problems that you might encounter in Sterling Supply Chain Visibility. For additional help with troubleshooting, contact IBM Customer Support.

Table 80. Error Message Details

Error Code	Error Description	Reason and Resolution
SCV0043	This PO already exists for another vendor and cannot be invoiced.	You must check if the Seller EDI ID or the Receiver EDI ID is the same as in the PO. You must change the PO number and also ensure the you pass the same Sender EDI ID and the Receiver EDI ID that is used in the PO.
SCV0024	This Invoice number already exists for a Customer PO.	You cannot process the same Invoice number twice. You must use another Invoice number.
SCV0023	This Invoice number already exists for a PO.	You cannot process the same Invoice number twice. You must use another Invoice number.
SCV0012	The Sender EDI ID and Receiver EDI ID both do not exist.	No organization exists with this Receiver EDI ID and Sender EDI ID in the system. You must ensure that either the Sender EDI or Receiver EDI ID is created in the system. If it is not created, you must create them. You must also ensure that you are using the same Sender EDI and Receiver EDI ID as that is available in PO
SCV0013	Sender is a vendor but cannot identify the buyer organization. Check participant model.	This error is displayed when the Sender EDI ID exists but the Receiver EDI ID does not exist. This means that the seller exists and is a vendor but not an enterprise. The receiver which is a buyer organization, is not valid and does not have a Receiver EDI ID.
SCV0041	It is expected that the PO is unique among all seller organization.	This error is displayed when the seller organization is not present in the input XML file, the unique PO is not available with the passed order no, and also if there are more than one order found.
SCV0010	No organization exists with this Receiver EDI ID.	Change the Receiver EDI ID. You must add the Receiver EDI ID of the organization for which you are sending the document.
SCV0224	Shipment is already canceled.	This error is displayed when the shipment is already canceled.
SCV0026	EDI IDs passed are not correct so buyer organization cannot be determined.	This error is displayed when the EDI IDs passed for the buyer is not configured in the system for that buyer.
SCV0028	There is no customer purchase order with given order number in input XML.	The order number passed for the seller organization is not available in the system. The order must be created first using Create Order (850 document) and then process the failing XML file.

Table 80. Error Message Details (continued)

Error Code	Error Description	Reason and Resolution
SCV0128	Seller organization is not found.	This error is displayed when the Seller EDI ID is blank and also when the order is not available in the system. You must first add the Seller EDI ID or create order.
SCV0046	Carrier input is not valid.	This error is displayed when the SCAC attribute passed in the input XML file is not valid. You must add a valid SCAC attribute.
SCV0216	Shipment No. passed is not valid hence it cannot be replaced.	This error is displayed when the Shipment Number is blank or it is not available in input XML file and the action attribute has the value Replace. You can pass a valid Shipment No. or change the action attribute to Create.
SCV0219	Latest shipment can not be replaced with old shipment.	The transaction time attribute in the input XML is less than the transaction time for the shipment present in the system. You must change the transaction time to a value more than the present transaction time.
SCV0120	Shipment Number passed in input XML does not exist.	This error is displayed when the Shipment Number is not present in the system and the action attribute has the value Cancel. You cannot cancel a shipment that does not exist in the system.
SCV0220	Action is created and passed Shipment No. already exists.	This error is displayed when you are trying to create a shipment that is already present in the system.
SCV0215	A shipment in delivered status. It cannot be replaced.	This error is displayed when you are trying to replace a shipment that is already delivered. Based on the business logic the delivered shipment cannot be replaced.
SCV0225	Canceled shipment cannot be replaced.	This error is displayed when you are trying to replace a shipment that is already canceled. Based on the business logic the canceled shipment cannot be replaced.
SCV0223	Shipment cannot be created with zero quantity.	This error is displayed when all shipment lines passed in input XML file are not valid or the shipment quantity is zero at the shipment line level. You must pass a valid shipment quantity or a valid line identifier.
SCV0247	The number of lines in the document and the associated order exceeds the threshold.	Buyers and sellers can submit documents and orders that contain up to 5000 lines. The system calculates the number of lines in the document and adds the number of lines in the corresponding order. If the number of lines in the document plus the number of lines in the order is more than 5000 lines, Sterling Supply Chain Visibility rejects the transaction and returns this error.

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