

Sterling Selling and Fulfillment Foundation



Application Platform User Guide

Release 9.1

Sterling Selling and Fulfillment Foundation



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Release 9.1

Note

Before using this information and the product it supports, read the information in "Notices" on page 59.

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Chapter 1. Getting Started

Starting Sterling Selling and Fulfillment Foundation

About this task

To access IBM® Sterling Selling and Fulfillment Foundation:

Procedure

Point your browser to `http://<hostname>:<portname>/smcfs/console/start.jsp` where:

- `hostname` is the computer name or IP address of the computer where Sterling Selling and Fulfillment Foundation is installed.
- `portnumber` is the listening port of the computer where Sterling Selling and Fulfillment Foundation is installed.

Results

The browser now displays the Sign In window.

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

The Home page displays your assigned queues and the number of alerts assigned to that queue, as well as the number of alerts in that queue that are assigned to you, any alerts assigned to you (see Chapter 2, “Alert Console Screens,” on page 11), and any saved searches (see “Application Console: Search Window” on page 3) you may have.

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

Adding Sterling Selling and Fulfillment Foundation as a Trusted Web Site

About this task

You should set Sterling Selling and Fulfillment Foundation to be recognized as a trusted Web site. Not doing so could cause certain pop-up windows such as date and time selection to display a status bar, thereby hiding certain action buttons.

To add Sterling Selling and Fulfillment Foundation to the list of trusted Web sites:

Procedure

1. In the Internet Explorer menu bar, select Tools > Internet Options. The Internet Options pop-up window is displayed.
2. In the Internet Options pop-up window, Select the Security tab.

3. Click the Trusted sites icon.
4. Click the Sites action button. The Trusted sites pop-up window is displayed.
5. In the 'Add this Web site to the zone' text box, enter the server address where the Application Console is installed. The port number does not need to be specified.
6. Uncheck the 'Require server verification (https:) for all sites in this zone' checkbox.
7. Click OK. This will take you back to the Internet Options pop-up window.
8. Click OK.

The Application Console Layout














The Application Consoles can be selected from the navigation bar.

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

Understanding the Application Console User Interface Icons

The following table describes the icons used in the Application Console user interface.

Table 1. Application Console User Interface Icons

Icon	Name	Description
	Action	Indicates an action.
	Additional Attributes	Enables you to specify additional attributes for identification, shipping and so on.
	Address	Enables you to add or modify an address.
	Address Details	Enables you to view, modify, or add an address.
	Audit	Enables you to view the list of audits for the order, inventory item and so on.
	Calendar	Enables you to select a date from the calendar.
	Locale	Enables you to change the locale for your current session in the Application Console.
	Lookup	Enables you to search for the selected object.
	Payment Types	Enables you to view the payment information for the template order.
	Profile	Enables you to modify your user information, such as your password, locale, user interface theme, and contact address.
	Theme	Enables you to change the theme for your current session in the Application Console.
	Timestamp	Enables you to enter the time.
	Work Order Hold	Enables you to view holds that are applied to the work order.

Application Console: Search Window

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

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

Some search criteria fields let you select from a drop-down list of available criteria while others require you to enter criteria. For fields that you must enter criteria, you can enter the complete criteria, choose Is, Starts with, or Contains, and enter the applicable information, or you can leave the field blank and a general search is performed.

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

If you choose Contains and leave the criteria field blank, the application assumes you are searching for entities that contain a space for that criteria. If you want to perform a general search for a criteria field do not select Is, Starts With, or Contains. For example, if you want to perform a search for all alerts in which an Owner contains a space, you would select Contains from the Owner drop-down list and leave the entry field empty. Also note that you can use Contains and '%' to perform a wild card search. For example, Customer Contains 'Retail%'.

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

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

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

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

Application Console: List Window

A list window provides you with the results of the search you performed. It also provides general information about the individual results. Some list windows

provide multiple views that you can switch between. For example you can view a normal order list or a more detailed order list.

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


If you select an entity and perform a view action on it, a details window is displayed. If you select multiple entities and perform a view action on them, the first entity selected is displayed in the details window and the ability to switch between the multiple entities is provided.

Application Console: Details Window

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


Application Console: Action Bar

Action bars display the available actions that can be performed on a type of entity. If the user interface is being customized, the Action bar is described as an "inner panel title bar" in the Sterling Selling and Fulfillment Foundation *Sterling Selling and Fulfillment Foundation: Customizing Console JSP Interface for End-User* .

Actions are indicated by the **Action** icon (). For any action bar throughout the application, only four actions are displayed. If additional actions are available a More Actions icon is displayed on the action bar which can be chosen to reveal the remaining actions.

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

Application Console: Lookup Icons

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

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

Application Console: Sorting Tables

About this task

Many tables contain columns that can be sorted.

To sort tables:

Procedure

1. Right-click the header row of a standard table. A context menu appears.
2. From the context menu, select Sort Column which will only be displayed for sortable columns.

3. Copy the data that you want and paste it into the spreadsheet application of your choice.

Application Console: Exporting Data

About this task

Throughout the Application Console, you can export data from standard tables into an external spreadsheet. Standard tables consist of column headers and rows that contain data. Approximately 90-95 percent of the tables in the Application Consoles are standard tables.


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


To export data to a spreadsheet:

Procedure

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

Application Console: Date and Time Icons

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

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

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

Application Console: Using Context-Sensitive Help

Each window has a Help button. Choose this button to open Context-Sensitive Help that contains information relevant to the current window.

Application Console: Performing a Modification

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

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

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

Application Console: Login Permissions

This section explains the difference in the Sterling Selling and Fulfillment Foundation Console application when you are logged in for the following types of users:

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

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

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

Hub Users

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

Enterprise Users

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

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

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

Buyer and Seller Users

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

buyer or seller users, and permission should be revoked for such screens for buyer or seller users.

Node Users

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

Carrier User

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

Modifying Your User Profile

About this task

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

To modify your user profile:

Procedure

1. From the navigation bar, choose the **Profile** icon. The User Profile and Contact Address window displays.
2. In Existing Password, enter the existing password being used. This field is required if you are changing the user password.
3. In New Password, enter the password you want to use, if applicable.
4. In Confirm New Password, re-enter the password, if applicable.
5. From Locale, select the locale you are working in, if applicable.
6. From Theme, select the graphical color scheme you want to use for the Application Console, if applicable.
7. From the Contact Address panel, choose the **Address Details** icon. The Modify Address pop-up window appears.
8. Modify the applicable information and choose the Save button.
9. From the User Profile window, choose the Save button.

Changing Your Locale

About this task

You can change the locale for your current session in the Application Console.

When you sign in for your next session, the Application Console returns to the default locale. For information about changing your default locale, see “Modifying Your User Profile” on page 7.

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

To change the locale for your current session:

Procedure

1. From the navigation bar, choose the **Locale** icon. The Locale drop-down menu is displayed.
2. Select the locale you want to change to for your current session. The Application Console changes to the selected locale.

Changing the Theme in the Application Console

About this task

You can change the theme for your current session in the Application Console.

When you sign in for your next session, the Application Console returns to the default theme. For information about changing your default theme, see “Modifying Your User Profile” on page 7.

To change the theme for your current session:

Procedure

1. From the navigation bar, choose the **Theme** icon. The Theme drop-down menu is displayed.
2. Select the theme you want to change to for your current session. The Application Console changes to the selected theme.

User Permissions and Data Security

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

Troubleshooting Error Messages

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

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

Using Special Characters

Throughout the Applications Manager there may be instances where you need to use special characters in data entry. For information regarding the use of special characters in Sterling Selling and Fulfillment Foundation, see the *Sterling Selling and Fulfillment Foundation: Customization Basics*.

Chapter 2. Alert Console Screens

Alert Console Screens

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

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

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

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

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

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

Alert Consolidation

You can consolidate alerts based on the day or the hour of occurrence. For more information about alert consolidation details and their limitations, see the *Sterling Selling and Fulfillment Foundation: Product Concepts Guide*.

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

Alerts Search by Queue User Screen

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

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

Table 2. Alerts Search by Queue User

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

Alerts Search by Reference Screen

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

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

Table 3. Alerts Search by Reference

Fields	Description
Item ID	Enter the item ID contained in the alert you are searching for, if applicable. Note: This field can only be searched on if its values have been configured for a service in the Applications Manager.
Order No	Enter the order number contained in the alert you are searching for, if applicable.
Ship Node	Enter the ship node contained in the alert you are searching for, if applicable.
Reference Name	Enter the reference name contained in the alert you are searching for, if applicable.
Reference Value	Enter the reference value contained in the alert you are searching for, if applicable.

Table 3. Alerts Search by Reference (continued)

Last Raised On Date	Enter the date range of the alert you are searching for, if applicable.
Raised Count	Enter the number of times the alert has been raised. This field is more appropriate for consolidated alerts.
Only Subscribed Queues	Select this if you only want to search for alerts in the queues you are subscribed to, if applicable.
Only Unassigned	Select this if you only want to search for alerts that have not be assigned yet, if applicable.
Max Records	Enter the maximum number of alerts you want returned from your search.

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

Alerts Search By Order Screen

This screen allows you to search for alerts by order. Clicking the search button takes you to the Alert List for Search by Order screen.

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

Table 4. Alert Search by Order

Fields	Description
Document Type	Note: Select the appropriate document type contained in the alert you are searching for, if applicable.
Enterprise	Choose the field and lookup option to find the specific Enterprise you want use. Or Choose "Across Enterprises" to use of all the Enterprises.
Alert Type	Enter the type of alerts you are searching for, if applicable.
Queue	Enter the queue that the alerts you are searching for are in, if applicable.
Assigned to User	Enter the user ID of the user the alerts you are searching for belong to, if applicable.
Last Raised on Date	Enter the date and time ranges to search.
Raised Count	Enter the number of times the alert has been raised. This field is more appropriate for consolidated alerts.
Alert Status	Select any or all of the following alert statuses: Open - to search for alerts that are in open status. Closed - to search for alerts that are no longer in open or WIP status. WIP - to search for alerts that are in Work In Progress (WIP) status.
Order Number	Enter the order number contained in the alerts you are searching for, if applicable.
Buyer	Enter the Buyer of the order contained in the alerts you want to search for, if applicable.

Table 4. Alert Search by Order (continued)

Seller	Enter the Seller of the order contained in the alerts you want to search for, if applicable.
Total Amount	Enter the Total Amount of the order contained in the alerts you want to search for, if applicable.
Carrier Service	Enter the Carrier Service of any order line for the order contained in the alerts you want to search for, if applicable.
Payment Status	Enter the Payment Status of the order contained in the alerts you want to search for, if applicable.
Requested Delivery Date	Enter the requested delivery date range for the order contained in the alerts you want to search for, if applicable.
Max Records	Enter the maximum number of alerts you want returned from your search.

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

Alerts List in Home Page

A list of alerts is displayed in the home page of the Application Console. The field descriptions of that panel are described in the following table:

Table 5. Alerts List in Home Page

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

Alert List for Search by Queue User and Reference

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

Table 6. Alert List for Search by Queue User and Reference

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

Alert List for Search by Order

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

Table 7. Alert List for Search by Order

Actions	Description
View Details	This action button takes you to the Alert Details Screen screen which shows details for the selected alerts.
Assign to User	This action button takes you to the Assign an Alert to a User screen which allows you to assign the selected alerts to a different user.
Assign to Queue	This action button takes you to the Assign an Alert to a Queue screen which allows you to assign the selected alerts to a different queue.
Close	This action button closes the selected alerts.

Table 7. Alert List for Search by Order (continued)

Mark as WIP	This action button marks the selected alerts as a Work In Progress.
Remove from WIP	This action button marks selected the alerts as open.
UnAssign	The action button unassigns the selected alerts from the user to which it used to be assigned.
Fields	Description
Alert ID	The alert ID.
Alert Type	The type of alert raised.
Queue	The queue the alert is assigned to.
Assigned To User	The user the alert is assigned to.
Last Raised On	The date the alert was last raised.
Alert Status	The current status of the alert.
Created For	The document type for which the alert was created.
Enterprise Code	Enterprise code of the order contained in the alerts.
Buyer	Buyer of the order contained in the alerts.
Seller	Seller of the order contained in the alerts.
Total Amount	Total amount of the order contained in the alerts.
Carrier Service	The Carrier Service of any order line for the order contained in the alerts
Payment Status	Payment Status for the order contained in the alerts.
Requested Delivery Date	The requested delivery date range for the order contained in the alerts.
Details	Specific details pertaining to the alert.

Alert Details Screen

This screen shows the details of an alert.

Table 8. Alert Detail Screen, Alert

Actions	Description
Assign to User	This action button takes you to the Assign an Alert to a User screen which allows you to assign the alert to a different user.
Assign to Queue	This action button takes you to the Assign an Alert to a Queue screen which allows you to assign the alert to a different queue.
Close	This action button closes the alert.
Mark as WIP	This action button marks the alert as a Work In Progress.
Remove from WIP	This action button marks the alert as open.
UnAssign	The action button unassigns the alert from the user to which it used to be assigned.
Fields	
Alert ID	The unique identification number of the alert.
Alert Type	The type of alert. For example, CHARGE_FAILED or INVENTORY_CHANGED.

Table 8. Alert Detail Screen, Alert (continued)

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

Table 9. Alert Detail Screen, Comments

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

Table 10. Alert Detail Screen, References

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

Table 11. Alert Detail Screen, Audits

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

Table 11. Alert Detail Screen, Audits (continued)

To User	If the alert was assigned to a new user, this field displays the new user.
From Queue	If the alert was assigned to a new queue, this field displays the original queue.
To Queue	If the alert was assigned to a new queue, this field displays the new queue.

Assign an Alert to a Queue

About this task

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

Assign an Alert to a User

About this task

To assign an alert to a different user, type the user name in the text field or look him up using the User Lookup and click Save. No validation is made to verify a user can access the specified queue.

Add a Comment to an Alert

About this task

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

Chapter 3. Alert Screens

Rich-Client Platform (RCP)-Based Alert Screens

This topic explains how to manage alerts using the Rich Client Platform-based Alert screens.

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

You can also use queues to prioritize alerts. You can assign an alert to a queue of higher priority.

Alert Consolidation

You can consolidate alerts based on the day or hour of the alert's occurrence. For more information about the alert consolidation details and their limitations, see the *Sterling Selling and Fulfillment Foundation: Product Concepts Guide*.

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

Alerts Search Screen

You can enter the search criteria for existing alerts in this screen.

Table 12. Alert Search Screen

Field	Description
Alert Type	Select the appropriate alert type from the drop-down list.
Alert Status	Choose an appropriate alert status.
Queue	Select the queue from the drop-down list that contains the alert for which you are searching.
Order No	Select the order number contained in the alert you are searching for from the drop-down list.
Assigned to User	Select the name of the user from the drop-down list to whom the alert is assigned.
Order Total	Enter the total cost of the order to include in the search.
Raised On From <start date> To <end date>	Choose the date range between which the alert was raised.
Follow-up Date From <start date> To <end date>	Choose the date range between which the follow-up for the alert was done.
Carrier/Service	Select the carrier service of any order line for the order contained in the alerts you want to search for from the drop-down list.

Table 12. Alert Search Screen (continued)

Field	Description
Raised Count	Select the number of times an alert is raised from the drop-down list. This field is more appropriate for consolidated alerts.
Node	Select the node assigned to an alert.
Priority	Select the priority you want to assign for the alert from the drop-down list.
Shipment No	Enter the number that uniquely identifies the shipment.
Supplier ID	Enter the number that uniquely identifies the supplier that ships the order.
Hide Search Criteria	Click this button to hide the search criteria screen and display only the Alert Search Details screen.
Search	Click this button to view the alert type details.
Reset	Click this button to clear the alert type details.

Alert Search Details

You can view the alert details that display as a result of your alert search.

If multiple alerts matching your search criteria are found, a list of alerts displays. Click the appropriate alert. The Generic Alert Details Screen displays where you can view the alert details.

Table 13. Alert Search Details

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

Generic Alert Details Screen

You can view the details of an alert in this screen.

Table 14. Generic Alert Details Screen

Actions	Description
Assign to User	This action takes you to the Generic Alert Details Screen: Assign to User screen, which enables you to assign the alert to a different user.

Table 14. Generic Alert Details Screen (continued)

Assign to Queue	This action takes you to the Generic Alert Details Screen: Assign to Queue screen, which enables you to assign the alert to a different queue.
Close	This action closes the alert.
Mark as WIP	This action marks the alert as Work In Progress.
Remove from WIP	This action marks the alert as open.
Unassign	This action unassigns an alert from the user.
Change Priority	This action takes you to Generic Alert Details Screen: Change Priority screen, which enables you to change the priority of an alert.
Fields	
Alert ID	The unique identification number of the alert.
Alert Type	The type of alert. For example, CHARGE_FAILED or INVENTORY_CHANGED.
Description	A description of the action taken when the exception was raised.
Queue	The name of the queue where the alert is assigned.
Assigned to User	The name of the user to whom the alert is assigned.
Alert Status	The status of the raised alert.
Details	
Receiving Location	Indicates the ship node of the order line for which the alert is raised.
Order No.	The order number associated with the alert, if applicable.
Supplier	The Seller that fulfilled the order.
Item ID	The identification number of the item associated with the alert.
Enterprise Key	Indicates the name of the enterprise for which the alert is raised.
Shipment No	The shipment number of the shipment for which the alert is raised.
First Raised On	The date on which the alert was first raised.
Last Raised On	The date on which the alert was last raised.
Raised Count	The number of consolidated alerts belonging to the same alert ID.
Resolved On	The date on which the alert was closed.
Resolved By	The name of the user who resolved the alert.
Priority	Indicates the priority of the alert.

Table 15. Generic Alert Details Screen, Comments

Actions	Description
Add Comment	This action button takes you to the Generic Alert Details Screen: Add Comments screen, which enables you to add comments to an alert. For more information about adding comments to an alert, see "Generic Alert Details Screen: Add Comments" on page 22.
Fields	

Table 15. Generic Alert Details Screen, Comments (continued)

Comment Text	Additional comments about the alert.
Logged On	The date on which the comment was logged.
Logged By	The user who logged the comment.

Table 16. Generic Alert Details Screen, References

Fields	Description
Reference Name	The reference name contained in the alert. This field is customizable.
Reference Value	The reference value contained in the alert. This field is customizable.

Table 17. Generic Alert Details Screen, Audits

Fields	Description
From User	If the alert is reassigned to a new user, this field displays the original user.
To User	If the alert is reassigned to a new user, this field displays the new user.
From Queue	If the alert is reassigned to a new queue, this field displays the original queue.
To Queue	If the alert is reassigned to a new queue, this field displays the new queue.
From Status	The current state of the alert.
To Status	The state to which the alert is changed.

Generic Alert Details Screen: Add Comments

You can add comments to an alert in this screen.

Table 18. Add Comments

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

Generic Alert Details Screen: Assign to User

When an alert task needs to be addressed by a particular user, you can assign those alerts to that specific user. For example, certain alert tasks can only be completed by a supervisor, therefore, you can assign the alerts that require the completion of such tasks directly to a specific supervisor.

Table 19. Assign To User

Field	Description
Currently Assigned To User	The user to whom the alert is currently assigned.
Assign To User	Enter the identifier of the user to whom you want to assign the alert.

Table 19. Assign To User (continued)

Field	Description
Find User	
User ID Contains	Enter a known portion of the identifier for the desired user to search for that user and assign the alert to that person.
User Name Contains	Enter a known portion of the name of the desired user to search for that user and assign the alert to that person.
Action	
Find User	This action displays a list of users based on the search criteria.
Fields	
User ID	Displays a list of user identifiers based on the search criteria.
User Name	Displays a list of user names based on the search criteria.

Generic Alert Details Screen: Assign to Queue

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

Table 20. Assign to Queue

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

Generic Alert Details Screen: Close Alerts

You can close alerts that are resolved or no longer valid. For more information about closing alerts, see the Generic Alert Details Screen.

Generic Alert Details Screen: Mark as WIP

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

Generic Alert Details Screen: Remove from WIP

You can mark the status of an alert as open. For more information about marking an alert as open, see the Generic Alert Details Screen.

Generic Alert Details Screen: Unassign

If alerts are already assigned to a user, you can unassign them. For more information about unassigning alerts, see the Generic Alert Details Screen.

Generic Alert Details Screen: Change Priority

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

Table 21. Change Priority

Field	Description
New Priority	Enter the new priority number for the alert.

Chapter 4. Exception Console Screens

Exception Console Screens

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

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

The Exception Console provides you the ability to:

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

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

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

The Exception Console provides you the ability to:

- View all error groups logged by the Service Definition Framework
- Resequence the order of the APIs
- Edit individual exception's XMLs then resubmit the entire group of exceptions for reprocessing

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

For more information about configuring a service with exception groups, see the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*. For more information about coding your own user exit to implement exception groups, see the *Sterling Selling and Fulfillment Foundation: Extending Transactions*.

Exceptions Search By All Attributes Screen

This screen allows you to search for Service Definition Framework Exceptions. Clicking the search button takes you to the Exception List Window screen.

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

Table 22. Exceptions Search

Fields	Description
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Table 22. Exceptions Search (continued)

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

Exception List Window

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

Table 23. Exception List

Actions	Description
Ignore	This action button removes the selected exception from the exception list. Once an exception is ignored, the error cannot be reprocessed.
Reprocess	This action button submits the selected exceptions for reprocessing by an Integration Adapter. Note: Only exceptions in Initial or Saved states can be reprocessed. Reprocessing could result in another error if the API fails again.
View Details	This action button takes you to the Exception Details Screen screen which shows details for the selected exceptions.
Fields	
Error ID	The integration exception ID.
Service Name	The service from which the exception was generated.

Table 23. Exception List (continued)

Sub Service Name	The sub-service that caused the exception upon execution.
Created On	The date the exception was created.
Queue ID	The queue the exception was assigned to.
Exception State	The state of the exception. Can be Initial, Modified, Fixed, or Ignored.
Error Code	The error code for this exception.
Error Message	The error message for this exception.

Exception Details Screen

This screen displays the details of an exception.

Table 24. Exception Details Screen, Error

Actions	Description
Ignore	This action button ignores the exception whose details you're viewing. Once an exception is ignored, the error cannot be reprocessed.
Reprocess	This action button submits the exception for reprocessing by an Integration Adapter. Note: Only exceptions in Initial or Saved states can be reprocessed. Reprocessing could result in another error if the API fails again.
Fields	
Integration Error ID	The unique ID of the integration exception.
Service Name	The service from which the exception was generated.
Sub Service Name	The sub-service that caused the exception upon execution.
Queue ID	The queue the exception was assigned to.

Table 25. Exception Details Screen, Input XML

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

Table 26. Exception Details Screen, Error XML

The API's error XML is displayed in the text area.
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Table 27. Exception Details Screen, Error History

Fields	Description
Error ID	The unique ID of the exception.
Input XML	Link to the API's input XML.
Error XML	Link to the error XML generated by the API.
Created On	The date the exception was created.
Queue ID	The queue the exception was assigned to.

Table 27. Exception Details Screen, Error History (continued)

Exception State	The state of the exception. Can be Initial, Modified, Fixed, or Ignored.
Error Code	The error code for this exception.
Error Message	The error message for this exception.

Exception Groups Search by All Attributes Screen

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

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

Clicking the search button takes you to the Exception Group List Window screen.

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

Exception Group List Window

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

Table 28. Exception Group List

Actions	Description
View Details	This action button takes you to the Exception Group Details Screen screen which shows details for the selected exceptions.
Fields	
Error Group ID	The integration exception group ID.
Exception Group Name	The name of the exception group.
Created On	The date the exception was created on.
Queue ID	The queue the exception is assigned to.

Exception Group Details Screen

This screen shows the details for an exception group.

Table 29. Exception Group Details Screen, Error Group

Actions	Description
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Table 29. Exception Group Details Screen, Error Group (continued)

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

Table 30. Exception Group Screen, Error

Actions	Description
Ignore	<p>This action button allows you to ignore all exceptions within an exception group.</p> <p>Note: Individual errors in an exception group can be ignored. An entire exception group cannot be ignored. You must ignore each error to ignore an entire group.</p>
Fields	
Sequence No.	<p>The sequence the exception occurred in.</p> <p>To resequence a Service Definition Framework Exception Group, modify the values in the Sequence No. text boxes to reflect the new order, and click Save.</p> <ul style="list-style-type: none"> • Increase the sequence number to move an error down the list (completed later in the sequence). • Decrease the sequence number to move an error up the list (completed earlier in the sequence). <p>Note: The sequence values are always displayed as multiples of 10, regardless of what numbers were entered. For example, if there are three exceptions and you resequence them using the values 1, 2, and 3. When you save, the resequenced exceptions appear as 10, 20, and 30.</p>
Error ID	The unique ID of the exception.
Service Name	The service associated with the exception.
Sub Service Name	The sub-service that caused the exception upon execution.
Created On	The date the exception was created on.
Queue ID	The queue the exception is assigned to.
Exception State	The state of the exception. Can be Initial, Modified, Fixed, or Ignored.
Error Code	The error code associated with the exception.
Error Message	The error message associated with the exception.

Chapter 5. Document Template Screens

Document Template Screens

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

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

Template Order Entry Screen

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

Table 31. Template Order Screen, Header Details

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

Table 32. Template Order Screen, Instructions

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

Template Order Search Screen

This screen allows you to search for previously defined template orders. Clicking the search button will take you to the Template Order List Window screen.

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

Table 33. Template Order Search by All Attributes

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

Table 33. Template Order Search by All Attributes (continued)

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

Template Order List Window

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

Table 34. Template Order List

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

Template Order Details Screen

This screen shows the details for a template order.

Table 35. Template Order Detail Screen, Template Order

View Icons	Description
Payment Types	Payment Information - This icon takes you to the Order Payment Information screen where you can view the payment information for the template order.
Additional Attributes	More Attributes - This icon takes you to the More Template Order Attributes Screen screen where you can specify additional attributes for Identification, Shipping and Financials.

Table 35. Template Order Detail Screen, Template Order (continued)

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

Table 36. Template Order Detail Screen, Instruction

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

Table 37. Template Order Detail Screen, Ship To

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

Table 38. Template Order Detail Screen, Bill To

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

Copying Attributes from Parent Line to Chained Line

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

Item attributes (ItemId, ProductClass, UnitOfMeasure) can be overridden in the chained line only when the inventory is not maintained by the buyer organization and by the seller organization. The logic to copy OrderLineInvAttRequest, KitLine will still be based on the template. Schedules will be copied if they are not passed.

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

Copying Attributes from Chained Line to Parent Line

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

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

More Template Order Attributes Screen

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

For template order header field descriptions, refer to the Template Order Detail Screen, Template Order table for details.

Table 39. More Template Order Attributes Screen, Identification

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

Table 39. More Template Order Attributes Screen, Identification (continued)

Priority Code	The priority that the Buyer has given to the order.
Requested Ship Date	The date by which the customer has requested the order to be shipped.
Scheduling Rule	The scheduling rule that is used when the order is scheduled. For more information about scheduling rules, see the <i>Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide</i> .
Currency	The monetary currency used for the order.
Customer PO Number	Enter the customer's purchase to search for orders containing an item that has a specific customer purchase order number, if applicable.

Table 40. More Template Order Attributes Screen, Shipping

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

Table 41. More Template Order Attributes Screen, Financials

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

Table 42. More Template Order, Other Attributes

Fields	Description
Entered By	This field displays the user ID of the user who entered the order.
Source	The method of order entry. For example, web site, kiosk.

Table 42. More Template Order, Other Attributes (continued)

Customer ID	The customer's ID.
Notification Type	Indicates the method through which users are notified of special instructions. For example, e-mail.
Notification Reference	A description of the notification.
Vendor ID	The vendor's ID.

More Order Addresses Screen

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

For template order header field descriptions, refer to the Template Order Detail Screen, Template Order table for details.

Table 43. More Order Addresses Screen, Forward To

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

Template Order Audits Screen

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

For template order header field descriptions, refer to the Template Order Detail Screen, Template Order table for details.

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

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

Template Order Audits Screen, Audits

Template Order Audit Details Screen

You can view a template order audit's details.

Table 44. Order Audit Details Screen, Order Audit

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

Table 44. Order Audit Details Screen, Order Audit (continued)

Description	The description of the item that is being audited.
Modification Type	The type of modification performed on the order.
Reason Code	The reason code detailing why the modification was performed.
Reason Text	Additional details about why the modification was performed.
Reference #1	Reference information about the order audit.
Reference #2	Reference information about the order audit.
Reference #3	Reference information about the order audit.
Reference #4	Reference information about the order audit.

Table 45. Order Audit Details Screen, Order Audit Details

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

Organization Address Details Screen

Table 46. Address Details

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

Chapter 6. Lookup Screens

Lookup Screens

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

Address Lookup

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

Table 47. Address Lookup

Fields	Description
First Name	The first name of the contact at this address.
Last Name	The last name of the contact at this address.
E-Mail	The e-mail address for the contact at this address.
Address Line 1	The first line of the street address.
Address Line 2	The second line of the street address.
City	The city or town in which the street is located.
State	The state or providence in which the city or town is located.
Postal Code	The postal code for the city or town.
Country/Region	The country or region in which the state or province is located.
Max Records	The maximum number of records the search will find.

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

Address List Window

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

Table 48. Address List

Fields	Description
First Name	The first name of the contact at this address.
Last Name	The last name of the contact at this address.
E-Mail	The e-mail address for the contact at this address.
Address Line 1	The first line of the street address.
Address Line 2	The second line of the street address.

Table 48. Address List (continued)

Fields	Description
City	The city or town in which the street is located.
State	The state or providence in which the city or town is located.

Item Lookup

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

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

Table 49. Item Lookup

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

Item List Window

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

Table 50. Item List

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

Order Lookup

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

Table 51. Order Lookup

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

Order List Window

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

Table 52. Order List

Fields	Description
Order #	The order number.
Status	The statuses of the order.
Enterprise	The enterprise associated with the order.
Buyer	The buyer of the order.
Order Date	the date the order was created.
Total Amount	The total amount of the order.

Order List Lookup

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

Table 53. Order List

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

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

Inbound Order Lookup

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

Table 54. Inbound Order Lookup

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

Inbound Order List Window

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

Table 55. Inbound Order List

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

Return Lookup

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

Table 56. Return Lookup

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

Return List Window

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

Table 57. Return List

Fields	Description
Return #	The return number.
Status	The status of the return.
Enterprise	The enterprise associated with the return.
Buyer	The buyer of the return.
Return Date	The seller of the return.
Total Amount	The total amount of the return.

Order Line Lookup

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

Table 58. Order Line Lookup

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

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

Order Line List Window

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

Table 59. Order Line List

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

User Lookup

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

Table 60. User Lookup

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

Catalog Item Lookup

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

Table 61. Catalog Item Lookup

Fields	Description
Organization	The name of the organization.
Category ID	The category ID.
Description	A description of the item.

Table 61. Catalog Item Lookup (continued)

Fields	Description
Max Records	The maximum number of records the search will find.

Catalog Item List Window

The Catalog List window displays the results of a Catalog Item lookup search. Refer to the Catalog Item List table for assistance.

Table 62. Catalog Item List

Fields	Description
Organization Code	The organization code.
Category ID	The name of the organization.
Description	A description of the item.

Buyer, Seller, or Enterprise Organization Lookup

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

Table 63. Buyer, Seller, or Enterprise Lookup

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

Buyer, Seller, or Enterprise Organization List

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

Table 64. Buyer, Seller, or Enterprise Organization List

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

Node Lookup

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

Table 65. Node Lookup

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

Node List Window

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

Table 66. Node List

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

Location Lookup

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

Table 67. Location Lookup

Fields	Description
Node	Select the node you are searching for.
Location	The location of the node.
Zone	The zone the location is located in.

Table 67. Location Lookup (continued)

Fields	Description
Max Records	The maximum number of records the search will find.

Location List Window

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

Table 68. Location List

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

Zone Lookup

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

Table 69. Zone Lookup

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

Zone List Window

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

Table 70. Zone List

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

Receipt Lookup

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

Table 71. Receipt Lookup

Fields	Description
Document Type	The document type.
Enterprise	Enter the enterprise the receipt belongs to or select Across Enterprises to search for all receipt.
Receiving Node	The receiving node.
Receiving Dock	The receiving dock.
Receipt #	The receipt number.
Buyer	The buyer of the receipt.
Seller	The seller of the receipt.
Order #	The order number.
Shipment #	The shipment number.
Receipt Date	The date of the receipt.
Receipt Status	The status of the receipt.
Max Records	The maximum number of records the search will find.

Receipt List Window

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

Table 72. Receipt List

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

Productivity Type Lookup

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

Table 73. Productivity Type Lookup

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

Productivity List Window

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

Table 74. Productivity Type List

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

Countries/Regions Lookup

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

Table 75.

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

Country/Region List Window

The Country/Region List window displays the results of a Country/Region Of Origin lookup search. You can populate the corresponding Country/Region Of Origin field by the selecting the checkmark of the applicable country or region. Refer to the following table for assistance.

Table 76. Country/Region List

Fields	Description
Country/Region	The name of the country or region.
Country/Region Code	The country or region code.
Organization Code	The organization code associated with the country or region.

Shipment Lookup

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

Table 77. Shipment Lookup

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

Shipment List Window

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

Table 78. Shipment List

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

Adjustment Reason Code Lookup

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

Table 79.

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

Adjustment Reason Code List Window

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

Table 80. Adjustment Reason Code List

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

Wave Lookup

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

Table 81. Wave Lookup

Fields	Description
Node	Select the node you want to search for waves in.
Shipment#	Enter the shipment number of the shipment that belongs to the wave you are searching for, if applicable.
Wave #	Enter the wave number of the wave you are searching for, if applicable.
Wave Status	Select the status of the waves you are searching for.
Shipment Group	Enter the shipment group that the waves you are searching belong to.

Table 81. Wave Lookup (continued)

Fields	Description
Release No Earlier Than	Enter the Release No Earlier Than date range that you want to search for waves in. Only waves with a Release No Earlier Than date that falls within the range you specify considered.
Release No Later Than	Enter the Release No Later Than date range that you want to search for waves in. Only waves with a Release No Later Than date that falls within the range you specify considered.
Max Records	Enter the maximum number of waves you want returned from your search.

Wave List Window

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

Table 82. Wave List

Fields	Description
Wave #	The wave number.
Shipment Group	The shipment group that the wave belongs to.
Status	The status of the wave is in.
Sequence #	The sequence number associated with the wave.
Release No Earlier Than	The wave is not released for picking before this date.
Release No Later Than	The wave is not release for picking after this date.

Count Request Lookup

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

Table 83. Count request Lookup

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

Count Request List Window

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

Table 84. Count Request List

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

Category Details

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

Table 85. Category Details Screen, Category Detail

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

Table 86. Category Details Screen, Sub Categories

Fields	Description
Category ID	Any category that is under the selected category. Choose the link to switch to this category.
Description	A brief description of the sub-category.
Category Path	The path to the sub-category.

Table 87. Category Details Screen, Category Items

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

Table 87. Category Details Screen, Category Items (continued)

Fields	Description
Description	A brief description of the item.

Category List Window

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

Table 88. Category List

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

Region Lookup

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

Region List Window

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

Table 89. Region List

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

Region Details Screen

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

Table 90. Region Details Screen, Region Detail

Fields	Description
Region	The name of the region.

Table 90. Region Details Screen, Region Detail (continued)

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

Table 91. Region Details Screen, Sub Regions

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

Item Classification Lookup

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

Table 92. Search Fields in Item Classification Search Window

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

Item Classification List Window

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

Table 93. Classification List

Fields	Description
Classification Id	The classification Id.
Description	A brief description of the classification.
Classification Path	The path to the selected classification.
Catalog Organization	The organization that owns the catalog containing the classification.

Item Classification Details Screen

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

Table 94. Classification Details Screen, Classification Detail

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

Table 95. Classification Details Screen, Sub Classifications

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

Table 96. Classification Details Screen, Classification Items

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

Work Order Lookup

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

Table 97. Work Order Lookup

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

Table 97. Work Order Lookup (continued)

Fields	Description
Service Complexity Level	Select either simple or complex for the Service Complexity Level.
Max Records	The maximum number of records the search will find.

Work Order List Window

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

Table 98. Work Order List

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

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