

Sterling Business Center

Item Administration Guide

9.1.0.2



Copyright

This edition applies to the 9.1 Version of IBM® Sterling Business Center and to all subsequent releases and modifications until otherwise indicated in new editions.

Before using this information and the product it supports, read the information in *Notices* on page 352.

Licensed Materials - Property of IBM

IBM® Sterling Business Center

© Copyright IBM Corp. 2009, 2011. All Rights Reserved.

US Government Users Restricted Rights - Use, duplication or disclosure restricted by GSA ADP

Schedule Contract with IBM Corp.

Contents

Sterling Business Center Item Administration Overview	10
Initial Configurations by Item Administrators.	11
Initial Configurations by System Administrators	12
Initial Configurations to Use Configurable Models	13
Configurations to Preview Item Details	13
Understanding the Sterling Business Center Application User Interface	15
Change Your Context Organization.	19
Log In to Sterling Business Center	20
Using the Home Page	21
Catalog Administration	21
Pricing Administration	23
Storefront Management	23
Merchandising Management.	23
Execute Favorite Saved Searches	24
Access Recently Modified Entities	24
View Coupon Usage Chart	24
Create a Regular Item	26
Create a Bundle Item.	27
Create a Physical Kit Item	28
Create a Dynamic Physical Kit Item	29
Create an Item With Variations	30
Create a Logical Kit Item	32
Search for an Item	33
Basic Item Search	33
Advanced Item Search	34
Add More Search Criteria	34
Save an Item Search.	35
Perform a Search Using a Saved Item Search	35
Modify a Saved Item Search.	36
Save a Search.	37
Manage Saved Searches	38
Rename a Saved Search	38
Delete a Saved Search	38
View and Execute a Saved Search.	39
Mark a Saved Search as a Favorite	40
Add an Existing Item as a Child Item to a Variation Item	41
Modify a Child Item of a Variation Item	42
Remove a Child Item from a Variation Item.	43
Define Primary Information of an Item.	44

Localize the Fields in the Sterling Business Center Application	46
Define an Item's Units of Measure	47
Define a Pricing Unit of Measure if Different from Inventory Unit of Measure	48
Add an Alternative Unit of Measure	49
Modify an Alternative Unit of Measure	51
Remove an Alternative Unit of Measure	52
Manually Add an Instruction to an Item	53
Add an Instruction from Existing Instruction Codes to an Item	54
Modify an Item's Instruction	55
Modify the Sequence of an Instruction	56
Delete an Instruction from an Item	57
Define the Fulfillment Details for Sourcing and Transporting an Item	58
Define the Return Fulfillment Details to Accept Item Returns	61
Define the Return Fulfillment Details to Decline Item Returns	63
Assign an Attribute Value to an Item Attribute	64
Override an Attribute Value of an Item Attribute	66
Modify the Attribute Value of an Item Attribute	67
Assign Multiple Attribute Values to an Item Attribute	69
Assign Values to the Extended Fields for an Item	71
Configuring the Inventory for a Tagged Item	72
Configure the Inventory for a Tagged Item	72
Configure the Tag Attributes for Tag Identifiers	74
Configure the Inventory for a Nontagged Item	76
Associate a Cross-Sell Item to an Item	79
Modify the Cross-Sell Item's Details	81
Dissociate a Cross-Sell Item from an Item	82
Associate a Category to an Item for a Cross-Sell Association	83
Modify the Effective Date Range of a Category for a Cross-Sell Association	84
Dissociate a Category from an Item for a Cross-Sell Association	85
Associate an Up-Sell Item to an Item	86
Modify the Up-Sell Item's Details	88
Dissociate an Up-Sell Item from an Item	89
Associate a Category to an Item for an Up-Sell Association	90
Modify the Effective Date Range of a Category for an Up-Sell Association	91
Dissociate a Category from an Item for an Up-Sell Association	92
Associate a Supersession Item to an Item	93
Modify the Supersession Item's Details	95
Dissociate a Supersession Item from an Item	96
Associate a Category to an Item for a Supersession Association	97
Modify the Effective Date Range of a Category for a Supersession Association	98
Dissociate a Category from an Item for a Supersession Association	99
Associate a Preferred Substitution Item to an Item	100
Modify the Preferred Substitution Item's Details	102
Dissociate a Preferred Substitution Item from an Item	103
Associate a Category to an Item for a Preferred Substitution Association	104
Modify the Effective Date Range of a Category for a Preferred Substitution Association	105
Dissociate a Category from an Item for a Preferred Substitution Association	106
Associate an Alternative Item to an Item	107
Modify the Alternative Item's Details	109
Dissociate an Alternative Item from an Item	110
Associate a Category to an Item for an Alternative Association	111

Modify the Effective Date Range of a Category for an Alternative Association	112
Dissociate a Category from an Item for an Alternative Association	113
Associate a Competitive Item to an Item	114
Modify the Competitive Item's Details	116
Dissociate a Competitive Item from an Item	117
Associate a Category to an Item for a Competitive Association	118
Modify the Effective Date Range of a Category for a Competitive Association	119
Dissociate a Category from an Item for a Competitive Association	120
Add an Asset to an Item	121
Modify Asset Details	122
Delete an Asset from an Item	123
Associate a Keyword to an Item	124
Dissociate a Keyword from an Item	125
Associate an Alias to an Item	126
Dissociate an Alias from an Item	127
Associate an Exclusion Code to an Item	128
Dissociate an Exclusion Code from an Item	129
Define the Merchandising and Sales Details of an Item	130
Add a Node and Define the Node Details of an Item	133
Modify Node Details	135
Remove a Node from an Item	136
Define an Item Classification	137
Create a Delivery Service	140
Define Primary Information for a Delivery Service	141
Create a Provided Service	143
Define Primary Information for a Provided Service	144
Create a Return Pickup Service	146
Define Primary Information for a Return Pickup Service	147
Create a Value-Added Service	149
Define Primary Information for a Value-Added Service	150
Search for a Service	153
Basic Service Search	153
Advanced Service Search	153
Add More Search Criteria	154
Save a Service Search	154
Perform a Search Using a Saved Service Search	155
Modify a Saved Service Search	155
Manually Add an Instruction to a Service	157
Add an Instruction from Existing Instruction Codes to a Service	158
Modify the Sequence of an Instruction for a Service	159
Modify a Service's Instruction	160
Delete an Instruction from a Service	161
Assign Values to the Extended Fields for a Service	162
Associate a Provided Service to an Item	163
Modify a Provided Service Associated to an Item	165
Dissociate a Provided Service from an Item	166
Associate a Delivery Service to an Item	167
Modify a Delivery Service Associated to an Item	168
Dissociate a Delivery Service from an Item	169
Associate a Return Pickup Service to an Item	170
Modify a Return Pickup Service Associated to an Item	171

Dissociate a Return Pickup Service from an Item	172
Manually Assign an Item and Define the Item Quantity for a Physical Kit or Bundle Item	173
Manually Assign a Service Item and Define the Service Quantity for a Physical Kit or Bundle Item	174
Manually Remove an Existing Item or a Service from a Physical Kit or Bundle Item	175
Create a Configurable Item	176
Associate a Model to the Bundle Item.	176
Create a Preconfigured Item	178
Use a Model to Create an Item as a Preconfigured Item	178
Change the Configuration Model of a Configurable or Preconfigured Item.	179
Modify the Configuration of a Preconfigured Item	180
Preview Item Details	181
Add a Service Activity to a Value-Added Service	182
Modify a Service Activity for a Value-Added Service.	184
Remove a Service Activity from a Value-Added Service.	186
Add a Service Option to a Provided or Delivery Service	187
Remove a Service Option from a Provided or Delivery Service	188
Associate a Service Skill to a Provided Service or a Delivery Service	189
Dissociate a Service Skill from a Provided Service or a Delivery Service.	190
Associate a Kitting and Deking Service to a Physical Kit or a Dynamic Physical Kit Item	191
Dissociate a Kitting and Deking Service from a Physical Kit or a Dynamic Physical Kit Item	192
Define the Merchandising and Sales Details of a Service.	193
Associate a Keyword to a Service.	195
Dissociate a Keyword from a Service	196
Associate an Alias to a Service	197
Dissociate an Alias from a Service	198
Associate an Exclusion Code to a Service	199
Dissociate an Exclusion Code from a Service.	200
Associate a Cross-Sell Service to a Service	201
Modify the Cross-Sell Service Details	203
Dissociate a Cross-Sell Service from a Service	204
Associate an Up-Sell Service to a Service	205
Modify the Up-Sell Service Details	207
Dissociate an Up-Sell Service from a Service.	208
Associate a Supersession Service to a Service	209
Modify the Supersession Service Details	211
Dissociate a Supersession Service from a Service.	212
Associate a Preferred Substitution Service to a Service	213
Modify the Preferred Substitution Service Details	215
Dissociate a Preferred Substitution Service from a Service	216
Associate an Alternative Service to a Service.	217
Modify the Alternative Service Details	219
Dissociate an Alternative Service from a Service	220
Associate a Competitive Service to a Service.	221
Modify the Competitive Service Details	223
Dissociate a Competitive Service from a Service	224
Add an Asset to a Service	225
Modify an Asset for a Service	226
Delete an Asset from a Service.	227
Generate a New Search Index	228
Generate an Incremental Search Index.	229
Activate a Search Index.	230

Delete a Search Index	231
Delete Search Indexes by Date	232
Delete an Item	233
Delete a Service	234
Define the Attribute Domain Details	235
Create an Attribute Group	236
Modify an Attribute Group	237
Create an Attribute	238
Modify the Details of an Attribute	241
Modify the Sequence of Attribute Groups and Attributes	243
Assign a List of Values to a Text Attribute	244
Assign Free-Form Text Values to a Text Attribute	246
Delete a Value from a Text Attribute	248
Add Allowed Value Assets to a Text Attribute	249
Modify Allowed Value Assets for a Text Attribute	250
Delete Allowed Value Assets from a Text Attribute	251
Define the Properties of a Boolean Attribute	252
Assign all the Numbers to a Number Attribute	253
Assign Specific Numbers to a Number Attribute	254
View Derived Attributes	255
Define a Range for a Derived Attribute	256
Modify the Sequence of a Derived Attribute Value Range	257
Delete a Range from a Derived Attribute	258
Add a Postfix to an Attribute Value	259
Modify a Postfix for an Attribute Value	260
Remove a Postfix	261
Add an Asset to an Attribute	262
Modify an Asset for an Attribute	263
Delete an Asset from an Attribute	264
Delete an Attribute	265
Delete an Attribute Group	266
Add an Organization to a Subcatalog Organization List	267
Remove an Organization from a Subcatalog Organization List	268
Create a Customer Entitlement	269
Search for a Customer Entitlement	270
Basic Entitlement Search	270
Advanced Entitlement Search	270
Add More Search Criteria	271
Create a Customer Entitlement Rule	272
Modify a Customer Entitlement Rule	275
Remove a Customer Entitlement Rule	278
Associate a Generic Customer Group to a Customer Entitlement	279
Define a Customer Entitlement Without a Customer	281
Add a Customer Profile Criteria to a Customer Entitlement	282
Modify Customer Profile Criteria for a Customer Entitlement	284
Remove Customer Profile Criteria from a Customer Entitlement	285
Associate a Specific Customer to a Customer Entitlement	286
Dissociate a Specific Customer from a Customer Entitlement	288
Delete a Customer Entitlement	289
Create a Seller Entitlement	290
Search for a Seller Entitlement	291

Basic Entitlement Search	291
Advanced Entitlement Search.	291
Add More Search Criteria	292
Create a Seller Entitlement Rule	293
Modify a Seller Entitlement Rule	295
Remove a Seller Entitlement Rule.	296
Associate an Organization to a Seller Entitlement	297
Dissociate an Organization from a Seller Entitlement	298
Delete a Seller Entitlement	299
Test a Customer Entitlement.	300
Define Master Catalog Details.	302
Create a Catalog	303
Authorize a Subcatalog Organization to Manage a Catalog	304
Modify Catalog Details.	305
Set a Catalog as an Active Selling Catalog.	306
Add an Asset to a Catalog.	307
Modify Asset Details in a Catalog	308
Delete an Asset from a Catalog.	309
Create a Category	310
Modify Category Details	311
Modify the Sequence of Categories and Child Categories	312
Authorize a Subcatalog Organization to Manage a Category	313
Assign an Item to a Category	314
Assign a Provided Service to a Category	315
Move an Item from One Category to Another Category	316
Move a Provided Service from One Category to Another Category	317
Assign Multiple Values to an Attribute in a Category.	318
Remove an Item from a Category	319
Remove a Provided Service from a Category.	320
Add an Asset to a Category.	321
Modify Asset Details in a Category	322
Delete an Asset from a Category	323
Assign an Attribute to a Category	324
Assign a Value to an Attribute in a Category.	325
Assign a Usage to an Attribute in a Category	327
Remove an Attribute from a Category	328
Associate a Keyword to a Category	329
Dissociate a Keyword from a Category	330
Delete a Category	331
Delete a Catalog	332
View Classification List	333
Create a Classification.	334
Modify a Classification.	335
Add a Usage to a Classification.	336
Remove a Usage from a Classification	337
Create a Classification Value	338
Modify a Classification Value.	339
Assign an Item to a Classification	340
Move an Item from One Classification Value to Another Classification Value	341
Remove an Item from a Classification.	342
Assign an Attribute to a Classification	343

Assign a Usage to an Attribute in a Classification	344
Remove an Attribute from a Classification	345
Define Inheritable Attribute Fields	346
Delete a Classification Value	349
Delete a Classification	350
Launch the Visual Modeler Application	351

Notices	352
----------------	------------

Trademarks	354
----------------------	-----

Index	356
--------------	------------

Sterling Business Center Item Administration Overview

You can use IBM® Sterling Business Center to efficiently set up and maintain your organization's catalog, and define the peripheral components of items, such as assets, classifications, and so on, after your organization has downloaded all the items' details into the Sterling database. For each item or service, you can define and assign a set of characteristics, which are referred to as attributes, in Sterling Business Center. You can logically group the items that share a set of attributes, into categories. Sterling Business Center's task-based user interface enables you to seamlessly define a category, assign attributes to a category, and specify which item fits into which category. Each item that is assigned to a category inherits all the attributes assigned to that category.

For example, you can create an item, a flat panel television, and a provided service, the installation service, for that television. You can then create a category, Televisions, which defines the attributes of all televisions, including the display type, screen size, and so on. When the flat panel television item is added to the category, Televisions, the flat panel television item will automatically inherit all the attributes associated to the category, Televisions. If the attributes are used for item specifications, they will be displayed on the customer's Web site for customers to view when placing an order.

After you define items, you can define item classifications and classification hierarchies that can be used to control other processes in the application, such as sourcing, associating services, determining shipping preferences, and so on. By defining a classification, you identify an item field as having a specified use in Sterling Selling and Fulfillment Foundation.

You can authorize an organization other than the catalog organization, to maintain a portion of the master catalog if your business requires it. Although enterprises can share the master catalog, in some cases, a catalog organization may want to extend the master catalog to other enterprises, allowing them to manage categories within the catalog.

A catalog organization is an enterprise that maintains the master catalog and defines other enterprises as subcatalog organizations. A catalog organization authorizes subcatalog organizations to manage the categories within the master catalog, and defines seller entitlements that grant or restrict other organizations' access to categories within the master catalog. Depending on an organization's seller entitlements, the organization may be able to view or sell catalog items that are maintained by the catalog organization or other organizations. Let us assume that you are required to allow a supplier to manage a category, Brand-X, in the catalog, while ensuring that the details of Brand-X are not visible to competitors of Brand-X. In such a scenario, you can define seller entitlements that grants and restricts other organizations' access to the categories in the catalog. Similarly, you can define customer entitlements to allow an enterprise to define the items its customers can buy.

Subcatalog organizations are enterprises that refer to a catalog organization as their catalog organization. If a vendor or seller is an enterprise, you can set it as a subcatalog organization.

Using the catalog index building functionality, you can enable customers to search your organization's active selling catalog. From the Sterling Business Center UI, you can create a searchable index file for each locale from the data that is available in the Selling and Order Management Foundation database. This index file is used to ensure that item searches are accomplished with fast response time.

Note: When entering values in an ID field, such as Category ID, it is recommended that you use alpha-numeric characters in English, and standard symbols for other languages. You must avoid use of special characters in an ID field. For a complete list of special characters that you must **not** use in an ID field, contact your system administrator.

Initial Configurations by Item Administrators

To utilize the functionalities provided by Sterling Business Center, you must perform certain tasks in the Applications Manager before you start using the Sterling Business Center application. The following table lists these tasks:

Define...	To...
Service Types	Use these service types when creating a service.
Statuses	Use these statuses when modifying category details.
Instruction Types	Use these instruction types, which can be associated with either an item instruction code or a manually added instruction, to describe what kind of instructions they are.
Instruction Codes	Use these instruction codes to describe special instructions associated to an item.
Service Skills	Use these service skills when configuring a delivery service, provided service, or return pickup service.
Velocity Codes	Use these velocity codes when adding a node to an item.
Service Options	Use these service options when configuring a delivery service, provided service, or return pickup service in order to add additional capacity requirements for a service.
Exclusion Codes	Use these exclusion codes when configuring either items or services if your business practices involve regulating shipments for certain countries.
Alias Types	Use these aliases when configuring either items or services. Aliases are alternative item identifiers, which are displayed as fields in the details screen corresponding to either an item or a service.
Association Types	Use these association types when associating items to other items.
Asset Types	Use these asset types when adding assets that are electronic media objects, and can be associated to items, categories, attributes, and attribute values. If you are defining an item image, it is recommended that the size of the image is 115 pixels by 115 pixels.
Asset Content Location	Use this asset content location when adding assets that are electronic media objects, and can be associated to items, categories, attributes, and attribute values.
Cost Posting Classification	Use this cost posting classification when defining an item's classification.

For more information about the tasks that must be performed prior to using Sterling Business Center, refer to the *Catalog Management: Configuration Guide*.

Initial Configurations by System Administrators

A system administrator must perform certain tasks to enable you to utilize the functionalities provided by Sterling Business Center. The following table lists the tasks and the guides that can be referred to perform these tasks:

Define...	To...	Refer To...
Activity Codes	Use these activity codes when adding a service activity to a value-added activity.	<i>Catalog Management: Configuration Guide</i>
Statuses	Use these statuses when configuring either an item or a service.	<i>Catalog Management: Configuration Guide</i>
Units Of Measure (UOM)	Use these when creating an item.	<i>Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide</i>
Countries and Regions of Origin	Use these when defining an item's country or region of origin.	<i>Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide</i>
Cost Factor Groups	Use these when defining the bundle components of either a physical kit item or a dynamic physical item.	<i>Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide</i>
Nodes	Use these when managing the node attributes of an item.	<i>Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide</i>
Primary Suppliers	Use these when managing the inventory attributes of an item.	<i>Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide</i>
Tag Identifiers	Use these when managing the inventory attributes of an item.	<i>Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide</i>
Tag Attributes	Use these when managing the inventory attributes of an item.	<i>Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide</i>
ATP Rules	Use these when managing the inventory attributes of an item.	<i>Sterling Global Inventory Visibility: Configuration Guide</i>
Node Level ATP Monitor Rules	Use these when managing the inventory attributes of an item.	<i>Sterling Global Inventory Visibility: Configuration Guide</i>
ATP Monitor Rules	Use these when managing the inventory attributes of an item.	<i>Sterling Global Inventory Visibility: Configuration Guide</i>
Organizations	Use these to define the catalog and subcatalog organizations.	<i>Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide</i>
Customers	Use these when managing customers for a customer entitlement.	<i>Sterling Distributed Order Management: Configuration Guide</i>

Define...	To...	Refer To...
sterling-webc hannel-visual modeler-url context parameter in web.xml The URL context parameter value must follow the following format: http(s)://<se rver>:<port>/ <context> For example, <https://10.2 3.23.25:1010/ Sterling>	Launch the Visual Modeler from within Sterling Business Center.	<i>Sterling Business Center: Customization Guide</i>

For more information about catalogs, items, and the peripheral components of items, refer to the *Catalog Management: Concepts Guide*.

Note: A 404 Exception may be displayed when launching the Visual Modeler application from the Sterling Business Center application if the Skin ID that is defined for a storefront in the Visual Modeler application does not match the organizationcode.

Initial Configurations to Use Configurable Models

As an administrator, you must perform the following configurations so that the configurable models, which are defined in the Visual Modeler application, can be used. If an item is created as a configurable item, it can be associated to a model that represents all the possible valid configurations for that item.

1. Establish one organization as the catalog organization.
2. Synchronize the catalog organization as the deployed enterprise in the Visual Modeler application.
3. Synchronize all catalog organization users in the Visual Modeler application.
4. Synchronize all locales in the Visual Modeler application.

For more information about these configurations, refer to the *Visual Modeler: Administration Guide*.

Configurations to Preview Item Details

After an item is created and its attributes are defined, you can preview the item details the way it would be displayed in the Sterling Web application. However, ensure that the following configurations are performed so that an item can be previewed:

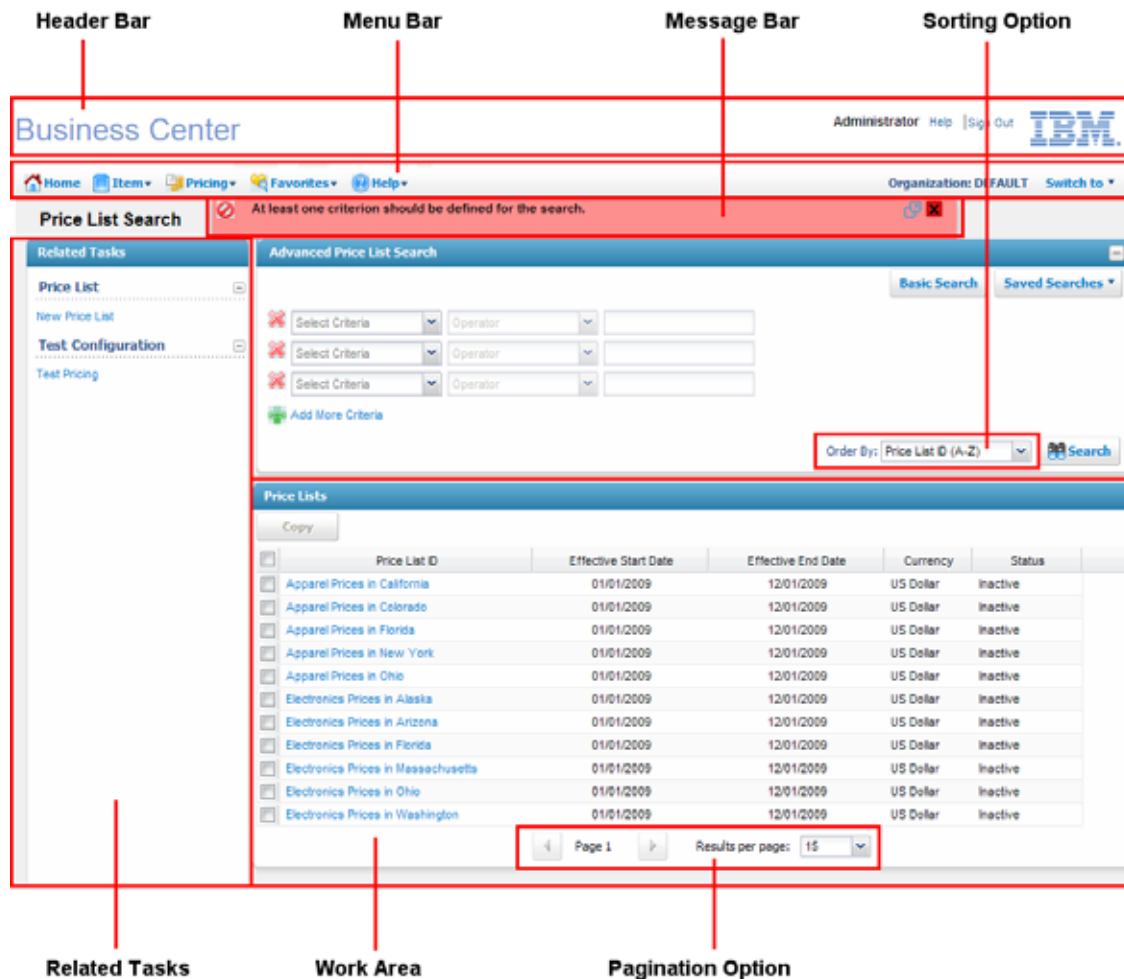
- The item is entitled to the guest user in the Sterling Web application.
- The item is assigned to a catalog for which a catalog index has been created.

- Set the URL or implement the user exit to preview the item details. You can perform either of the following configurations:
 - Define the `sterling-webchannel-itempreview-url` context parameter in `web.xml`. The URL context parameter value must follow the following format:
`<http://<webchannel-host>:<port>/<context>/<item details action>`
For example, `<https://10.23.23.25:1010/Sterling>/catalog/itemDetails.action`
 - Implement the `YCMGetWebChannelItemPreviewURLUE` user exit to obtain the URL for previewing the item details.
Input: The user exit takes the item details element as the input. The default output of the `getItemDetails` API along with the "Extn" element must be passed to the user exit.
Output: The user exit returns the complete URL of the Sterling Web application.
- **Note:** If you have implemented both the `YCMGetWebChannelItemPreviewURLUE` user exit, and set `sterling-webchannel-itempreview-url` context parameter in `web.xml`, only the `YCMGetWebChannelItemPreviewURLUE` user exit will be considered.

Understanding the Sterling Business Center Application User Interface

Familiarizing yourself with the layout of the Sterling Business Center application and the navigational mechanism used in the application will help you use the application more efficiently.



The following figure illustrates the user interface layout:





The application user interface allows you to expand and collapse the panels in managing the work area, thus enabling you to manage your work area efficiently.

The user interface comprises the following elements:










- Header Bar - The header bar displays the following information and hyperlinks:
 - Application Name - The name of the application, in this case, Sterling Business Center.
 - User Name - The name of the user who has logged in to the application.
 - Sign out - Click this hyperlink to log out of the application.


















- **Menu Bar** - This comprises various menu options or tasks provided in the application. Select the appropriate option that you want to perform. You can click **Home** to navigate directly to the application's Home page. In order to view the context-sensitive help describing the current screen, and to know about the application, click **Help** in the Menu bar.
- **Message Bar** - This displays any status updates, warning messages, or error messages to provide assistance when performing a task.
- **Related Tasks** - This panel displays all the related tasks that you can perform. These related tasks are dynamically populated based on the task you are currently performing.
- **Work Area** - This is the area within the application window where you can view and modify details pertaining to the current task.
- **Pagination** - The search results are displayed in multiple pages. In order to view the search results across the multiple pages, click  to navigate to the previous page and click  to navigate to the next page.

You can also determine the number of search results that are displayed on each page. From the **Results per page** drop-down list, select an option. For example, if you select 10, when you are viewing the search results for the items in a list, ten items will be displayed in ten rows.




- **Sorting** - You can sort the search results, as required. From the **Order By** drop-down list, select the required option. For example, when searching for items, you can sort the search results in either an ascending or a descending order.
- **Icons** - In the Sterling Business Center application, you can perform certain tasks by clicking the corresponding icons in the UI. For example, you can click  adjacent the Date field to select a date. However, a few icons only indicate a condition, and cannot be used to perform tasks. For example,  pertaining to a column in a grid indicates that the column is both an editable field and a mandatory field.


The following table lists the icons that can be used to perform certain tasks across the Sterling Business Center application:

Icon	Action
	Click this icon to view the details of the selected entity.
	Click this icon to view a list of available values for an entity. For example, click  to view a list of classification values when creating an item with variation.
	Click this icon to localize the corresponding field.
	Click this icon to select a date.
	Click this icon to move an entity one place higher in a list. For example, you can click  to modify the sequence of an item instruction in the Instructions screen.
	Click this icon to move an entity one place lower in a list. For example, you can click  to modify the sequence of an item instruction in the Instructions screen.

Icon	Action
	Click this icon to move an entity from one table to another table. For example, you can select a classification usage from the Subscribed Usages table, and click  to move the selected classification usage to the Available Usages table and vice versa in the Classification Management screen.
	Click this icon to move an entity from one table to another table. For example, you can select a classification usage from the Available Usages table, and click  to move the selected classification usage to the Subscribed Usages table in the Classification Management screen.
	Click this icon to move all the entities from one table to another table. For example, you can click  to move all the classification usages from the Subscribed Usages table to the Available Usages table in the Classification Management screen.
	Click this icon to move all the entities from one table to another table. For example, you can click  to move all the classification usages from the Available Usages table to the Subscribed Usages table in the Classification Management screen.
	Click this icon to add a new condition or criteria. For example, click  to add a new criteria when performing an advanced search for an entity.
	Click this icon to delete an existing condition or criteria. For example, click  to delete an existing criteria when performing an advanced search for an entity.
	Click this icon to view the next page when search results are displayed in multiple pages.
	Click this icon to view the previous page when search results are displayed in multiple pages.
	Click this icon to mark a saved search as a favorite.
	Click this icon to remove the favorite saved search from the favorite saved searches list.
	Click this icon in the Message bar for more details about an error message.

The following table lists the icons that indicate a condition across the Sterling Business Center application:

Icon	Description
	Indicates that the corresponding field is a mandatory field.
	Indicates that the corresponding column in a grid is both editable and mandatory.
	Indicates that the corresponding column in a grid is editable but not mandatory.

Icon	Description
	<p>Indicates that an entity can be dragged and dropped within a group to modify its sequence or between tables to modify selections.</p> <p>For example, to modify the sequence of an attribute within a group in the Item Attributes tree, you can drag and drop the attribute to the required position in the Attribute Management screen. Similarly, to modify the selection of a classification usage, you can drag and drop the classification usage from the Subscribed Usages table to the Available Usages table in the Classification Management screen.</p>

Note: Though the Web browser toolbar is hidden, you can perform actions such as navigating back to the previous page, refreshing the current page, and so on, using the browser hot keys. However, it is recommended that you do not do so.

Change Your Context Organization

A context organization is the organization that you are administering at a given point in time. For example, you can administer two organizations, a pricing organization called PricingOrg1 and a catalog organization called CatalogOrg1. If you log in as a PricingOrg1 user, your context organization will be set to PricingOrg1 immediately after you log in. PricingOrg1 will be the organization that you can administer immediately after you log in.

Based on your context organization, you will be able to perform certain administration tasks and view certain task-related information. The corresponding menu items and related tasks will be displayed based on the context organization. For example, if you log in as a pricing organization user, you will be able to perform pricing administration tasks such as creating a price list, managing a price list, and so on. However, you will only have read-only access to certain catalog administration tasks such as modifying the details of an item, and you will not have access to certain catalog administration tasks such as creating an item.

If you can administer more than one organization, you can change your context organization to the organization you want to administer at any point of time after logging in to the application.

To change the context organization:

1. From the **Switch To** drop-down list in the application header bar, select the organization that you want to administer. The **Switch To** drop-down list displays the list of organizations that are administered by your organization.
2. The application home page is displayed, showing the menu items and tasks applicable to the organization that you have selected. For example, if you logged in as a pricing organization user and you change your context organization to a catalog organization, you will be able to perform all the catalog administration tasks such as managing a catalog, creating a service, and so on. However, you will only have read-only access to certain pricing administration tasks such as modifying the details of a coupon.

Log In to Sterling Business Center

To access the Sterling Business Center application and use its features, you must first log in to the application using a valid user ID and password. Only enterprise users can log in to the Sterling Business Center application.

Note: When you log in using a browser or a browser version that is not supported by Sterling Business Center, a warning dialog box is displayed to report browser incompatibility. If you continue using an unsupported browser or browser version, you may encounter user interface issues. For more information about the browsers and browser versions supported by Sterling Business Center, see the *Sterling Selling and Fulfillment Foundation: System Requirements Guide*.

To log in to the application:

1. Point your browser to the URL provided by your system administrator.
2. A new browser window is displayed. Enter your user ID and password, and click **Sign In**.

The Sterling Business Center home page is displayed.

Note: It is recommended that the timezone of the system where the browser is running is same as the logged-in user's timezone.

Using the Home Page

The home page is the first screen that is displayed after you log in to the Sterling Business Center application. If you want to navigate to the Home page at any point of time when using the application, click **Home** available in the menu bar.

The home page enables you to perform various administration tasks. The tasks are grouped under their related business objects, which are in turn grouped under various modules. For example, the following groups of task hyperlinks are available under the Storefront Management module:


- **Manage Subcatalog** hyperlink under Subcatalog Organizations
- **New Entitlement** and **Find Entitlement** hyperlinks under Seller Entitlements

The home page enables you to perform the following tasks:

- [Catalog Administration](#)
- [Storefront Management](#)
- [Merchandising Management](#)
- [Pricing Administration](#)
- [Execute Favorite Saved Searches](#)
- [Access Recently Modified Entities](#)
- [View Coupon Usage Chart](#)

Note: The administration tasks that you can perform, and the task-related information that you can view, are dependent on your context organization.

Catalog Administration

Use this panel to perform a quick search for an item and to perform various catalog administration tasks. To search for an item, enter the unique identifier of the item in the **Quick Find Item** box, and click . To perform various administration tasks, click the corresponding task hyperlink. The following table describes the tasks that can be performed from the home page for the Catalog module:

Click...	To...	Click...	To...
New Item	<ul style="list-style-type: none"> ▪ Create a Regular Item ▪ Create a Bundle Item ▪ Create a Physical Kit Item ▪ Create an Item With Variations ▪ Create a Logical Kit Item ▪ Create a Logical Kit Item 	Manage Classifications	<ul style="list-style-type: none"> ▪ View Classification List ▪ Create a Classification

Click...	To...	Click...	To...
Find Item	Search for an Item	Manage Attributes	<ul style="list-style-type: none"> ▪ Define the Attribute Domain Details ▪ Create an Attribute Group
Browse Maintenance Catalog	<ul style="list-style-type: none"> ▪ Define Master Catalog Details ▪ Create a Category ▪ Add an Asset to a Category ▪ Modify Asset Details in a Category ▪ Delete an Asset from a Category ▪ Localize the Fields in the Sterling Business Center Application 	New Entitlement	Create a Customer Entitlement Rule
Manage Catalogs	<ul style="list-style-type: none"> ▪ Set a Catalog as an Active Selling Catalog ▪ Create a Catalog 	Find Entitlement	Search for a Customer Entitlement
New Service	<ul style="list-style-type: none"> ▪ Create a Delivery Service ▪ Create a Provided Service ▪ Create a Value-Added Service 	Test Entitlement Setup	Test a Customer Entitlement
Find Service	Search for a Service	Launch Visual Modeler	Launch the Visual Modeler Application
Manage Catalog Indexes	<ul style="list-style-type: none"> ▪ Generate a New Search Index ▪ Generate an Incremental Search Index ▪ Activate a Search Index ▪ Delete a Search Index ▪ Delete Search Indexes by Date 		

Pricing Administration

The following table describes the tasks that can be performed from the home page for the Pricing module:

Click...	To...	Click...	To...
New Price List	Create a Price List	New Pricing Rule	Create a Pricing rule
Find Price List	Search for a Price List	Find Pricing Rule	Search for a Pricing Rule
New Coupon	Create a Coupon		
Find Coupon	Search for a Coupon		

For more information about these tasks, see the *Sterling Business Center: Pricing Administration Guide*.

Storefront Management

The following table describes the tasks that can be performed from the home page for the Storefront module:

Click...	To...	Click...	To...
Manage Subcatalog Organizations	<ul style="list-style-type: none"> ▪ Add an Organization to a Subcatalog Organization List ▪ Remove an Organization from a Subcatalog Organization List 	New Entitlement	Create a Seller Entitlement
		Find Entitlement	Search for a Seller Entitlement

Merchandising Management

Use this panel to perform the following tasks:

- Manage Merchandising Aspects for Item
- Manage Cross-sells for Item
- Manage Up-sells for Item
- Manage Alternatives for Item

To perform these tasks, click  adjacent the **Enter Item** box to search for the identifier of the item. Select the corresponding option for the task, and click .

The following table describes the tasks that can be performed from the home page for the Merchandising module in addition to the tasks listed previously:

Click...	To...
Browse Selling Catalog	<ul style="list-style-type: none">▪ Define Master Catalog Details▪ Create a Category▪ Add an Asset to a Category▪ Modify Asset Details in a Category▪ Delete an Asset from a Category▪ Localize the Fields in the Sterling Business Center Application

Execute Favorite Saved Searches

The home page provides a **Favorite Searches** panel that enables you to quickly execute the saved searches marked as favorites. Only the first five favorite saved searches, which have been sorted in alphabetical order, are displayed in this panel. (To access the complete list of favorite saved searches, use the **Favorites** menu in the menu bar.) Click a saved search hyperlink to execute the corresponding saved search. The search screen is displayed with the search criteria and the search results populated.

Access Recently Modified Entities

The home page provides a **Recently Modified** panel that enables you to quickly navigate to the entities that you modified recently. The five most recently modified entities are displayed as hyperlinks in the order of the modification time, with the most recently modified entity at the top of the list. Each hyperlink belongs to one of the following business objects:

- Item
- Service
- Price List
- Pricing Rule
- Coupon

The hyperlinks are displayed in the *<business object> : <ID of the business object>* format. For example, an item that has the Item ID set as TV0001A5F21 will be displayed as follows: Item : TV0001A5F21

Click a hyperlink to view the details of the corresponding entity.

View Coupon Usage Chart

The home page displays a chart that depicts the coupon usage information pertaining to your organization. However, the chart will be displayed only if you belong to a pricing organization. The chart provides a graphical representation of the number of active coupons available for each coupon type. Each bar in the

chart represents a coupon type, and the length of the bars represents the number of active coupons available for that coupon type.

For more information about coupons, refer to the *Sterling Business Center: Pricing Administration Guide*.

Create a Regular Item

You can create an item of type, regular, for all the basic product items that make up your catalog. For example, a washing machine.


You can create a regular item from the Create Item screen.

To create a regular item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **New Item**. Alternatively, click the **New Item** hyperlink in the home page.
3. In the Create Item screen that is displayed, perform the following steps:

- a. Select the **Regular** radio button.
- b. In the **Item ID*** text box, enter the unique identifier for the item.
- c. From the **UOM** list, select the unit of measure that you want to associate with the item.

Note: The combination of a unit of measure and an item ID is unique. For example, if you sell the same item having the same item ID from a node in the United States and a node in Canada, and the United States uses pounds as the unit of measure and Canada uses kilograms, the two different units of measure associated with the item ID creates two unique items in the system.

- d. To associate this item to a category, click  in the **Associate to the category** box.
- e. The Category dialog box is displayed. From the **Catalog Hierarchy** tree, select the category of the maintenance catalog to which you want to associate the item, and click **Select**.

The item is associated to the selected category.

4. Click **Save**.

Note: * indicates that the field is mandatory.

A new item is created, and the Primary Information screen is displayed.

After an item is created, it is a good practice to define the item's description in the Primary Information screen. You can use this item description as a search criterion when you are performing an item search.

Create a Bundle Item

An item of type, bundle, is a collection of items, such as products or provided services. The inventory for a bundle is maintained at the individual component level. For example, a video game with a set of games CDs can be a bundle item. This collection can be sold as a single item, and you can maintain the inventory of both the video game and the CDs individually.

Note: Although you can provide inventory tags to a bundle, these tags are ignored by the Sterling Selling and Fulfillment Foundation.


You can create an item of type, bundle, when you want to logically group items together and maintain the inventory for these items individually.

You can create a bundle item from the Create Item screen.

To create a bundle item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **New Item**. Alternatively, click the **New Item** hyperlink in the home page.
3. In the Create Item screen that is displayed, perform the following steps:
 - a. Select the **Bundle** radio button.
 - b. In the **Item ID*** text box, enter the unique identifier for the item.
 - c. From the **UOM** list, select the unit of measure that you want to associate with the item.

Note: The combination of a unit of measure and an item ID is unique. For example, if you sell the same item having the same item ID from a node in the United States and a node in Canada, and the United States uses pounds as the unit of measure and Canada uses kilograms, the two different units of measure associated with the item ID creates two unique items in the system.

- d. To associate this item to a category, click  in the **Associate to the category** box.
 - e. The Category dialog box is displayed. From the **Catalog Hierarchy** tree, select the category of the maintenance catalog to which you want to associate the item, and click **Select**.

The item is associated to the selected category.
4. Click **Save**.

Note: * indicates that the field is mandatory.

A new item is created, and the Primary Information screen is displayed.

After an item is created, it is a good practice to define the item's description in the Primary Information screen. You can use this item description as a search criterion when you are performing an item search.

Create a Physical Kit Item


A physical kit is a combination of multiple components that are not individually defined as catalog items. The item availability is only verified for the parent item, and not for the child items. For example, you can create a kit for a computer with all the corresponding components, such as a CPU, screen, monitor, keyboard, and mouse. The buyer does not have the choice of selecting the individual components, but has to buy the components as one item.

You can create a physical kit item when you want to logically group items together, while maintaining the inventory **only** for a parent item.

You can create a physical kit item from the Create Item screen.

To create a physical kit item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **New Item**. Alternatively, click the **New Item** hyperlink in the home page.
3. In the Create Item screen that is displayed, perform the following steps:
 - a. Select the **Physical Kit** radio button.
 - b. In the **Item ID*** text box, enter the unique identifier for the item.
 - c. From the **UOM** list, select the unit of measure that you want to associate with the item.

Note: The combination of a unit of measure and an item ID is unique. For example, if you sell the same item having the same item ID from a node in the United States and a node in Canada, and the United States uses pounds as the unit of measure and Canada uses kilograms, the two different units of measure associated with the item ID creates two unique items in the system.
 - d. To associate this item to a category, click  in the **Associate to the category** box.
 - e. The Category dialog box is displayed. From the **Catalog Hierarchy** tree, select the category of the maintenance catalog to which you want to associate the item, and click **Select**.

The item is associated to the selected category.
4. Click **Save**.

Note: * indicates that the field is mandatory.

A new item is created, and the Primary Information screen is displayed.

After an item is created, it is a good practice to define the item's description in the Primary Information screen. You can use this item description as a search criterion when you are performing an item search.

Create a Dynamic Physical Kit Item

A dynamic physical kit is a set of various components that are not predefined as a kit. The components that make up the kit are decided at the time of creating an order. For example, when ordering a computer, a customer can decide to include or exclude some of the individual components of a computer. The customer may want the CPU, monitor, keyboard, and mouse, but not the speakers.


The inventory for a dynamic physical kit is maintained at the kit item (parent) level, and is usually associated with the kitting or dekitting service.

You can create a dynamic physical kit item from the Create Item screen.

To create a dynamic physical kit item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **New Item**. Alternatively, click the **New Item** hyperlink in the home page.
3. In the Create Item screen that is displayed, perform the following steps:
 - a. Select the **Dynamic Physical Kit** radio button.
 - b. In the **Item ID*** text box, enter the unique identifier for the item.
 - c. From the **UOM** list, select the unit of measure that you want to associate with the item.

Note: The combination of a unit of measure and an item ID is unique. For example, if you sell the same item having the same item ID from a node in the United States and a node in Canada, and the United States uses pounds as the unit of measure and Canada uses kilograms, the two different units of measure associated with the item ID creates two unique items in the system.

- d. To associate this item to a category, click  in the **Associate to the category** box.
 - e. The Category dialog box is displayed. From the **Catalog Hierarchy** tree, select the category of the maintenance catalog to which you want to associate the item, and click **Select**.
- The item is associated to the selected category.
4. Click **Save**.

Note: * indicates that the field is mandatory.

A new item is created, and the Primary Information screen is displayed.

After an item is created, it is a good practice to define the item's description in the Primary Information screen. You can use this item description as a search criterion when you are performing an item search.

Create an Item With Variations

An item with variations is a grouping of items that have varying attributes such as style, size, color, or other attributes. Such a grouping of items is useful when you have items that have individual variable attributes, but yet are similar. For example, a short-sleeved shirt that is available in multiple colors and sizes. The color and size of the short-sleeved shirt are the item's variable attributes.


You can create an item with variation only if you have created a classification with the usage, Distinct Attribute, and assigned various values to the classification.

Before creating an item with variations you need to perform the following tasks:

1. Define an attribute group. For more information, refer to [Create an Attribute Group](#).
2. Create attributes in the attribute group, which are required for the item with variations such as style, size, color, and so on. For more information, refer to [Create an Attribute](#).
3. Create a classification. For more information, refer to [Create a Classification](#).
4. Assign the usage to the classification as Distinct Attribute. For more information, refer to [Add a Usage to a Classification](#).
5. Create a classification value for the classification. For more information, refer to [Create a Classification Value](#).
6. Assign attributes to the classification value. For more information, refer to [Assign an Attribute to a Classification](#).

You can create an item with variations from the Create Item screen.

To create an item with variations:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **New Item**. Alternatively, click the **New Item** hyperlink in the home page.
3. In the Create Item screen that is displayed, perform the following steps:
 - a. Select the **Item With Variation** radio button.
 - b. Click  adjacent the item field. The item field that is displayed depends on the field that is selected in the classification management. For example, the item field may be **Item Type***, or **Product Type***, or any other item field.


Perform the following steps in the Classification Hierarchy dialog box that is displayed. This dialog box is displayed only when you have created a classification with the usage, Distinct Attribute, and assigned various values to the classification.

- i. From the Classification Hierarchy tree, select the value.
- ii. Click **Select**.

The selected value is displayed in the box adjacent the item field.

- c. In the **Item ID*** box, enter the unique identifier for the item. This identifier cannot be modified after it has been defined.
- d. From the **UOM** list, select the quantity unit of measure you want to associate with the item.

Note:The combination of a unit of measure and item ID is unique. For example, if you sell the same item with the same item ID from a node in the United States and a node in Canada, and the United States uses pounds for the unit of measure and Canada uses kilograms, the two different units of measure associated with the item ID makes two unique items in the system.

- e. To associate this item to a category, click  in the **Associate to the category** box.
- f. The Category dialog box is displayed. From the **Catalog Hierarchy** tree, select the category of the maintenance catalog to which you want to associate the item, and click **Select**.

The item is associated to the selected category.

4. Click **Save**.

Note: * indicates that the field is mandatory.

A new item is created, and the Primary Information screen is displayed.

After an item is created, it is a good practice to define the item description, from the Primary Information screen. You can use this item description as a search criteria when you are performing an item search. You can perform the following tasks after an item with variation is created:

- [Add an Existing Item as a Child Item to a Variation Item.](#)
- [Assign an Attribute Value to an Item Attribute](#)


Create a Logical Kit Item

You can create and manage a logical kit item in Sterling Business Center only if a system administrator has configured the **Enable Logical Kit Functionality** installation rule in the Applications Manager. By default, the value of this rule is set to N. The logical kit option is provided only for the backward compatibility purpose. You can manage logical kit items similar to the way you manage bundle items. However, you cannot use a configuration model to manage the components of a logical kit item.

To create a logical kit item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **New Item**. Alternatively, click the **New Item** hyperlink in the home page.
3. In the Create Item screen that is displayed, perform the following steps:
 - a. Select the **Logical Kit** radio button.
 - b. In the **Item ID*** text box, enter the unique identifier for the item.
 - c. From the **UOM** list, select the unit of measure that you want to associate with the item.

Note: The combination of a unit of measure and an item ID is unique. For example, if you sell the same item having the same item ID from a node in the United States and a node in Canada, and the United States uses pounds as the unit of measure and Canada uses kilograms, the two different units of measure associated with the item ID creates two unique items in the system.

- d. To associate this item to a category, click  in the **Associate to the category** box.
 - e. The Category dialog box is displayed. From the **Catalog Hierarchy** tree, select the category of the maintenance catalog to which you want to associate the item, and click **Select**.
- The item is associated to the selected category.
4. Click **Save**.

Note: * indicates that the field is mandatory.

A new item is created, and the Primary Information screen is displayed.

Search for an Item


You can search for an item and view its details using the following options:

- **Basic Item Search:** This type of search enables you to perform a quick search by specifying basic criteria such as the complete or partial identifier of the item, or the category to which the item is associated.
- **Advanced Search:** This type of search enables you to perform a search based on the criteria that you select. You can select the criteria and the corresponding operator, and then select or specify the corresponding values.

You can search for an item from the Item Search screen.

Basic Item Search

To perform a basic item search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. The Item Search screen is displayed. In the **Item ID Contains** box, enter the complete or partial identifier of the item you want to search for.
4. In the **Is Associated To The Category** box, click  to select the category to which the item is associated.
5. From the **Item Characteristic** drop-down list, select the characteristic of the item you want to search for.
6. In the **Item Short Description Contains** box, enter either the complete or partial description of the item you want to search for. For example, if the **Item Short Description** is A flat television panel, you can enter either panel, or television panel, as your search text.
7. Select the **Only include items for which today is within the effective date range** check box to include the items for which the current date lies within the effective date range, in the search.
8. Select the **Only include items which belong to my catalog** check box to include the items that belong only to your catalog, in the search.
9. Select the **Search only services and service options** check box to include services and service options in the item search result.

Note: This check box is displayed only if you are searching for an item in a pricing context. For example, this check box is available if you are searching for an item from the Price List Search screen, and not from Item Search screen.

The **Item Characteristic** drop-down list is dynamically populated depending on the check boxes selected.

10. Click **Search**.

The items matching the search criteria are displayed. However, if there is only one item matching the search criteria, the Primary Information screen is displayed.

Note: If the administration organization is not an item organization, the items that are available for the item organization of the administration organization are displayed.

Advanced Item Search

To perform an advanced Item search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. The Item Search screen is displayed. Click **Advanced Search**.
4. The **Advanced Search** panel is displayed. From the **Select Criteria** drop-down list, select the criteria that you want to include in the search. For example, to search for an item by status, select **Status** from the **Select Criteria** drop-down list.
5. From the **Operator** drop-down list, select the operator you want to use for the search criteria.

In the corresponding field, enter or select the appropriate value for the criteria. The fields are displayed based on the operator you select. For example, if you select **Effective Start Date** from the **Select Criteria** drop-down list, and **Between** from the **Operator** drop-down list, two fields in which you can enter or select the appropriate dates, are displayed.

Note: It is mandatory that you select or enter at least one search criteria and a corresponding value. If you select or enter more than one search criteria, the search will return the items that match all the criteria.

6. Click **Search**.

The items matching the search criteria are displayed. However, if there is only one item matching the search criteria, the Primary Information screen is displayed.

Note: If the administration organization is not an item organization, the items that are available for the item organization of the administration organization are displayed.

Add More Search Criteria

You can include additional search criteria to perform a more detailed search and narrow down the search results.

To include additional search criteria:

1. In the Advanced Item Search screen, click **Add More Criteria**.
2. A new row for specifying the search criteria is displayed. Enter the appropriate search criteria, and click **Search**.

The items matching the search criteria are displayed. However, if there is only one item matching the search criteria, the Primary Information screen is displayed.

Note: If the administration organization is not an item organization, the items that are available for the item organization of the administration organization are displayed.

Save an Item Search

You can save an item search to avoid entering the search criteria every time you search for a particular item.

To save an item search:

1. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
2. The Item Search screen is displayed. Enter the appropriate search criteria. Alternatively, click **Advanced Item Search** and enter the appropriate search criteria.
3. From the **Saved Searches** drop-down menu, select **Create Saved Search**.
4. The Save Search dialog box is displayed. In the **Saved Search Name*** box, enter a name for the search that is to be saved.
5. Select the **Include in favorite searches** check box to mark the saved search as a favorite. Marking a saved search as a favorite enables you to quickly navigate to that saved search from the home page. A maximum of five most recent favorite saved searches are displayed as hyperlinks under the **Favorite Searches** panel in the home page. You can also access the favorite saved searches using the Favorites menu in the header bar of the home page.
6. Click **Save**.

Note: * indicates that the field is mandatory.

Perform a Search Using a Saved Item Search

To search for an item using a saved item search:

1. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
2. The Basic Item Search screen is displayed. Click **Saved Searches** to view the list of saved item searches. Alternatively, click **Advanced Search** and click **Saved Searches**.

The saved item searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

Note: A maximum of five saved searches are displayed in the menu.

3. Perform either of the following tasks:
 - If the saved search is displayed in the menu, click **Saved Searches** to view the corresponding search results.
 - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Items dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search results. Alternatively, click a saved search name and click **Select** to view the corresponding search results.

Note: The **More Searches...** button is displayed only if there are more than eight saved item searches.

The Item Search screen is displayed with the search criteria populated along with the search results.

Modify a Saved Item Search

To modify a saved item search:

1. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
2. The Basic Item Search screen is displayed. Click **Saved Searches** to view the list of saved item searches. Alternatively, click **Advanced Search** and click **Saved Searches**.

The saved item searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

Note: A maximum of five saved searches are displayed in the menu.

3. Perform either of the following tasks:
 - If the saved search is displayed in the menu, click **Saved Searches** to view the corresponding search screen.
 - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Items dialog box is displayed. In the **Saved Search Name Contains** box, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search screen. Alternatively, click a saved search name and click **Select** to view the corresponding search screen.
- Note:** The **More Searches...** button is displayed only if there are more than eight saved item searches.
4. The Item Search screen is displayed with the search criteria populated. Modify the appropriate information, and select **Create Saved Search** from the **Saved Searches** drop-down menu.
5. The Save Search dialog box is displayed, with the name of the original saved search populated in the **Saved Search Name** box. Perform one of the following tasks:
 - To overwrite the original saved search, leave the name as is. The Confirm Overwrite dialog box, which contains a message asking you for confirmation about proceeding with the update of the original saved search, is displayed. Click **Yes**.
 - To save the search under a new name, enter a name for the search.
6. Select the **Include in favorite searches** check box to include the saved search in the list of favorites. If you select this check box, the saved search name will be displayed as a hyperlink in the home page and you can quickly navigate to the saved search by clicking the hyperlink.
7. Click **Save**.

The saved item search is modified.

Save a Search

You can save a search to avoid entering the search criteria every time you search for a particular entity such as an item, or a service.

You can save a search using the **Saved Searches** button in the Basic Search screen and Advanced Search screen.

To save a search:

1. From the **Saved Searches** drop-down menu, select **Create Saved Search**.
2. The **Save Search** dialog box is displayed. In the **Saved Search Name*** field, enter a name for the search that is to be saved.
3. Select the **Include in favorite searches** check box to mark the saved search as a favorite. Marking a saved search as a favorite enables you to quickly navigate to that saved search from the home page. A maximum of five most recent favorite saved searches are displayed as hyperlinks under the **Favorite Searches** panel in the home page. You can also access the favorite saved searches using the **Favorites** menu in the header bar of the home page.
4. Click **Save**.

Note: * indicates that the field is mandatory.

The search is saved. You can use Saved Searches when searching for the particular item, service, or entitlement.

Manage Saved Searches

A user can save a search to avoid the task of entering the search criteria every time the user wants to search for a particular entity, such as an item, or a service.

A user can manage the saved searches by performing the following tasks:

- Rename a saved search
- Delete a saved search
- View and execute a saved search
- Mark a saved search as a favorite

Rename a Saved Search

You can search for a saved search and rename it.

To rename a saved search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Favorites** menu, select **Manage Saved Searches**. Alternatively, if you are on the Basic Search or Advanced Search screen, select **Manage Saved Searches** from the **Saved Searches** drop-down menu.
3. The Save Search Management dialog box is displayed. In the **Find Saved Searches** panel, perform the following tasks:
 - a. In the **Saved Search Name Contains** field, enter either the complete name or partial name of the saved search.
 - b. From the **Search Type** drop-down list, select the appropriate entity. For example, to search for a saved price list search, select price list from the drop-down list.
 - c. Click **Search**.
4. The saved searches matching the criteria are displayed in the **Saved Searches** panel. Select the check box corresponding to the saved search you want to rename, and enter a new name in the **Saved Search Name** column.
5. Click **Save**.

The saved search is renamed.

Delete a Saved Search

You can search for a saved search and delete it.

To delete a saved search:


1. Log in to Sterling Business Center as an administrator.

2. From the **Favorites** menu, select **Manage Saved Searches**. Alternatively, if you are on the Basic Search or Advanced Search screen, select **Manage Saved Searches** from the **Saved Searches** drop-down menu.
3. The Save Search Management dialog box is displayed. In the **Find Saved Searches** panel, perform the following tasks:
 - a. In the **Saved Search Name Contains** field, enter either the complete or partial name of the saved search.
 - b. From the **Search Type** drop-down list, select the appropriate entity.
Note: If you navigated to the Saved Search Management dialog box by selecting **Manage Saved Searches** from the **Saved Searches** drop-down menu, the entity is already displayed in this field. You can either use this entity or select the appropriate entity from the drop-down list.
 - c. Click **Search**.
4. The saved searches matching the criteria are displayed in the **Saved Searches** panel. Select the check box corresponding to the saved search you want to delete, and click **Delete**.
The saved search is deleted.

View and Execute a Saved Search

You can search for a saved search and then view and execute it.

To view and execute a saved search:



1. Log in to Sterling Business Center as an administrator.
2. From the **Favorites** menu, select **Manage Saved Searches**. Alternatively, if you are on the Basic Search or Advanced Search screen, select **Manage Saved Searches** from the **Saved Searches** drop-down menu.
3. The Saved Search Management dialog box is displayed. In the **Find Saved Searches** panel, perform the following tasks:
 - a. In the **Saved Search Name Contains** box, enter either the complete or partial name of the saved search.
 - b. From the **Search Type** drop-down list, select the appropriate entity.
Note: If you navigated to the Saved Search Management dialog box by selecting **Manage Saved Searches** from the **Saved Searches** drop-down menu, the entity is already displayed in this field. You can either use this entity or select the appropriate entity from the drop-down list.
 - c. Click **Search**.
4. The saved searches matching the criteria are displayed in the **Saved Searches** panel. Select the check box corresponding to the saved search you want to view and execute, and click .
The search screen is displayed with the search criteria populated along with the search results.

Note: A search that is saved as a favorite from the Pricing Search screen is also accessible from the Item Search screen. Thus, if that saved search from the Pricing Search screen had the check box for **Search only services and service options** selected, the results for services and service related options can be viewed even from the Item Search screen.

Mark a Saved Search as a Favorite

You can mark a saved search as a favorite to quickly navigate to a saved search that you frequently use.

To mark a saved search as a favorite:

1. Log in to Sterling Business Center as an administrator.
2. From the **Favorites** menu, select **Manage Saved Searches**. Alternatively, if you are on the Basic Search or Advanced Search screen, select **Manage Saved Searches** from the **Saved Searches** drop-down menu.
3. The Save Search Management dialog box is displayed. In the **Find Saved Searches** panel, search for the appropriate saved search by performing the following tasks:
 - a. In the **Saved Search Name Contains** field, enter either the complete or partial saved search name.
 - b. From the **Search Type** drop-down list, select the appropriate entity.
 - c. Click **Search**.
4. The saved searches matching the criteria are displayed in the Saved Searches panel. Perform either of the following actions:
 - To mark a saved search as a favorite, click  corresponding to the saved search.
 - To remove the favorite mark from a saved search, click  corresponding to the saved search.
5. Click **Save**.

The saved search is marked as a favorite. You can now use the favorite saved search to search for the particular item, service, or entitlement.

Add an Existing Item as a Child Item to a Variation Item

You can define child items for a variation item. Child items are items that share common attributes with the parent item, but have an additional set of unique properties. For example, if the parent item is a short-sleeved shirt, the possible child items are small red short-sleeved shirt and medium red short-sleeved shirt.

The child item details are displayed in the Items Details screens as part of the variation item details.

You can add a child item by selecting from an existing item in the catalog.

To add an existing item as child item to a variation item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Variations**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Variations** panel, click **Add**.
 7. In the Item Search dialog box that is displayed, click **Search** to view a list of items available. Alternatively, use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
 8. Select the item from the list, and click **Select**.
 9. A new row is added in the **Variations** panel. Define values for the attributes that are displayed.

Notes:

- The attributes that are displayed depend on the configuration done from the Classification Management. For example, for a shirt item, the following may be the attributes configured: Style, Size, Color.
 - You cannot define multiple values of an attribute for a child item.
10. Click **Save** to add the child item to the variation item.

The existing item is added to the variation item as a child item.

Modify a Child Item of a Variation Item

You can modify the details of a child item that share common attributes with the parent item, but have an additional set of unique properties.

To modify a child item of a variation item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Variations**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the **Variations** panel, you can modify the details of a child item. Modify the value of the attributes that are displayed.

Notes:

- The attributes that are displayed depend on the configuration done from the Classification Management.
 - You cannot define multiple values of an attribute for a child item.
7. Click **Save** to save the modifications to the child item.

The child item is modified.

Remove a Child Item from a Variation Item

You can remove a child item from a variation item if you do not want to maintain the child item with an additional set of unique properties.

To remove a child item from a variation item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Variations**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Variations** panel, select the child item that you want to remove.
 7. Click **Remove Item**.
 8. A message asking you for confirmation is displayed. Click **Yes**.
- The selected child item is removed from the variation item.

Define Primary Information of an Item

After you have created an item, you can define the details for the newly created item. Also, if you have already defined the item details, you can modify the item details.



Note: You can only define the details of an item that belongs to your organization.

You can define primary information for an item from the Primary Information screen.

To define or modify the details for an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.

The Primary Information screen is displayed. The **Primary Information** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
5. From the **Item Status** drop-down list, select the status for the item. You can select any one of the following options:
 - **Held (Unpublished):** select this to make the item unavailable for order creation.
 - **Published:** select this to make the item available for order creation.
 6. In the **Descriptions** area:
 - a. Enter the **Short Description*** for the item. This description is displayed wherever the item and its details are displayed.
 - b. Enter the **Long Description** for the item. This description is displayed only when you view the item details.
 7. In the **Primary Fields** area:
 - a. Enter the **Effective Start Date**. Alternatively, click  to select a start date from the calendar. The date format displayed depends on your locale.
 - b. Enter the **Effective End Date**. Alternatively, click  to select an end date from the calendar. The date format displayed depends on your locale.

The defined start and end dates indicate the time range for which the item is available for order creation.
 - c. Enter **GTIN** (Global Tracking International Number).
 - d. Enter **GTIN Manufacturer Prefix Length**.



8. In the **Manufacturer's Information** area:
 - a. Enter the **Manufacturer's Name**.
 - b. Enter the **Manufacturer's Item**.
 - c. From the drop-down list, select the **Country/Region Of Origin**.
 - d. Enter the **Manufacturer's Item Description**.
9. Click **Save** in the Item Details screen.

The item details are saved.

For an Item With Variations, the details of the parent and the child are also displayed. Depending on whether the item is a parent or a child item, the following is displayed in the **Variation Information** area.

Type	Description
Parent	The Variation Information area displays the classification information for the item.
Child	The Variation Information area displays the following: <ul style="list-style-type: none"> ▪ Classification: the parent classification type. ▪ Parent Item and its attributes: click the Parent Item hyperlink to view the details of the parent item. The attributes that are displayed depends on the configuration performed in the Attribute Management. Ensure that you assign the Distinct Attributes usage to these attributes when assigning them to a classification that has the Distinct Attributes usage.

Notes:

- An item image is displayed adjacent the **Item Main Image** field in the Primary Information screen only if you have associated an image asset to the item when defining the merchandising and sales details of the item.
- If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).


The primary information of the item is defined. You can now perform the related tasks such as managing fields, managing UOM's, and so on.


Localize the Fields in the Sterling Business Center Application

You can choose to localize the fields in the Sterling Business Center application for the locales you have configured. For example, a customer may sell an item in more than one locale. In such a scenario, you can localize all the corresponding fields that can be viewed in the Sterling Web application. Thus, a user can access the Sterling Web application to buy the item and view all the information pertaining to that item in a localized format that is specific to the locale of the user.



Note: All the locale configurations must be completed before item description is entered. For more information about configuring locales, refer to the *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*.

To localize the fields in the Sterling Business Center application:

1. Log in to Sterling Business Center as an administrator.
2. Navigate to the screen whose description or values you want to localize. You can localize fields associated to various modules. For example, you can localize the short description of an item, an asset, a classification value, and so on.
3. In the **Related Tasks** panel, click **Localize**. Alternatively, click  adjacent the field you want to localize. To localize the field values of an asset, click **Localize** in the **Assets** panel.

The Localization screen pertaining to all the fields that can be localized is displayed. If you have clicked  adjacent a field, the Localization dialog box pertaining to that field is displayed.

4. From the **Locales** list box, select the locale for which you want to localize the fields.

Note: If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English.

The **Localized Value** box is automatically populated with the localized versions of the values displayed in the **Base Locale** box. The values in the **Base Locale** box cannot be edited.

Define an Item's Units of Measure

You can define a unit of measure (UOM) that can be used when defining unique identifier for an item. For an item, you can provide an item's weight and dimensions for shipping and storage purposes. You can specify the dimensions such as the length, width, and height of an item, along with the weight of the item. The volume value and the volume UOM are derived from the value and UOM you have entered for length, width, and height.

You can define an item's unit of measure from the Item UOMs screen.

To define an item's units of measure:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage UOMs**.
6. The Item UOMs screen is displayed. In the **Dimensions** panel, perform the following steps:
 - a. In the **Length** text box, enter the item's numerical length, and select its unit of measure (for example, inches) from the **Length UOM** drop-down list.
 - b. In the **Weight** text box, enter the item's numerical weight, and select its unit of measure (for example, pounds.) from the **Weight UOM** drop-down list.
 - c. In the **Width** text box, Enter the item's numerical width, and select its unit of measure (for example, inches) from the **Width UOM** drop-down list.
 - d. In the **Height** text box, Enter the item's numerical height, and select its unit of measure (for example, inches) from the **Height UOM** drop-down list.
7. Click **Save**.

Note: The item's numerical **Volume** and **Volume UOM** are auto-populated.

The item's unit of measure is defined.

Define a Pricing Unit of Measure if Different from Inventory Unit of Measure

You can define a pricing unit of measure (UOM) that can be used when a product item's pricing is based on a different unit of measure than its inventory unit of measure.

For example, let us assume you have a product item called Apples that are inventoried and sold using the unit of measure, Cases. However, the pricing is determined by the weight of each case. In this scenario, you would assign the product item Apples with the inventory unit of measure Cases, and the pricing unit of measure Weight.

You can define a pricing unit of measure from the Item UOMs screen.

To define a pricing UOM if it is different from the Inventory UOM:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage UOMs**.

The details panel is displayed, with the following read-only boxes:

- Short Description
- Item Characteristic
- Status

6. In the **Pricing** panel of the Item UOMs screen, perform the following:
 - a. Select the **Pricing UOM is different from inventory UOM** check box if this item uses a different unit of measure for pricing calculations from the unit of measure associated with the actual inventory of the product item.
 - b. If you selected **Pricing UOM is different from inventory UOM**, then select from the **Pricing UOM** drop-down list the unit of measure you want to use to price the item.
 - c. If you selected **Pricing UOM is different from inventory UOM**, then in the **Default Pricing UOM Conversion Factor** text box enter the conversion rate from the inventory unit of measure to the pricing unit of measure. For example, a product item has an inventory unit of measure of EACH, and a pricing unit of measure of CASE. Four (4) EACH make up 1 CASE. In this scenario, you would enter "4" as the conversion factor.
7. Click **Save**.

The pricing UOM that is different from the inventory UOM is defined.

Add an Alternative Unit of Measure

You may have to create an item whose unique item ID and unit of measure combination can be packaged in more multiple ways. In such a scenario, you can create alternative ordering units of measure that can be used in the selling environment.

For example, you may create a unique item ID and unit of measure combination for a 6-Pack of Pens. However, in your selling environment, you sell this item in any one of the three ways: individually, cases, and pallets. In this scenario, you can create three alternative units of measure that can be associated with the 6-Pack inventory unit of measure: 6-Pack, Case, and Pallet.

You can add an alternative unit of measure from the Item UOMs screen.

To add an alternative unit of measure:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage UOMs**.

The details panel is displayed, with the following read-only boxes:

- Short Description
- Item Characteristic
- Status

6. In the **Alternate UOMs** panel of the Item UOMs screen, click **Add**.
7. The New Alternate UOM dialog box is displayed. Perform the following steps:
 - a. In the **Details** area, select the alternative unit of measure you want to use from the **UOM*** drop-down list.
 - b. In the **Conversion Quantity Into Inventory Quantity*** text box, enter the conversion quantity from the inventory quantity to the alternative unit of measure. For example, if you are configuring an alternative unit of measure called DOZEN for an item with an inventory unit of measure of EACH. Twelve (12) EACH make up 1 DOZEN. In this scenario, you must enter “12” as the conversion quantity.
 - c. Enter **Positive Package Tolerance Quantity**. This defines the maximum quantity of the item over the conversion quantity.
 - d. Enter **Negative Package Tolerance Quantity**. This defines the minimum quantity of the item below the conversion quantity.

For example, if you have defined the conversion quantity as 12, the Positive Package Tolerance Quantity as 2, and the Negative Package Tolerance Quantity as 1, then the number of items that are

available for ordering is between 11 to 14, where 11 is equal to **Conversion Quantity to Inventory UOM** minus **Negative Package Tolerance Qty**, and 14 is equal to **Conversion Quantity to Inventory UOM** plus **Positive Package Tolerance Qty**.

- e. Select the **This UOM is used for ordering** check box if this unit of measure can be used when placing orders for this item.
- f. In the **Weight** text box, enter the item's numerical weight, and select its unit of measure (for example, pounds) from the **Weight UOM** drop-down list.
- g. In the **Length** text box, enter the item's numerical length, and select its unit of measure (for example, inches) from the **Length UOM** drop-down list.
- h. In the **Width** text box, enter the item's numerical width, and select its unit of measure (for example, inches) from the **Width UOM** drop-down list.
- i. In the **Height** text box, enter the item's numerical height, and select its unit of measure (for example, inches) from the **Height UOM** drop-down list.
- j. Click **Save**.

Note: * indicates that the field is mandatory.

The alternative UOM is added to the inventory UOM, and the UOM list is updated with the newly added UOM.

Modify an Alternative Unit of Measure

You can modify an alternative unit of measure (UOM) for an item so that it can be used in the selling environment in a new way.

To modify an alternative unit of measure:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage UOMs**.

The details panel is displayed, with the following read-only boxes:

- Short Description
- Item Characteristic
- Status

6. In the **Details** panel of the Item UOMs screen, perform the following steps:
 - a. Select the UOM you want to modify.
 - b. Modify the UOM details in the **Selected UOM** panel.

Caution: Do not modify the **Conversion Quantity to Inventory Quantity*** text box if orders exist in the system using this unit of measure.

- c. To modify another UOM, repeat step a to step b.

Note: Do not clear the check box adjacent to an UOM when navigating between UOMs.

7. Click **Save**.

The alternative unit of measure is modified.

Remove an Alternative Unit of Measure

You can remove an alternative unit of measure if you do not want to create an item whose unique item ID and unit of measure combination can be packaged in more multiple ways.

To remove an alternative unit of measure:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage UOMs**.

The details panel is displayed, with the following read-only boxes:

- Short Description
- Item Characteristic
- Status

6. In the **Alternate UOMs** panel of the Item UOMs screen, perform the following steps:
 - a. Select the UOM you want to remove.
 - b. Click **Remove**.
 - c. A message asking you for confirmation is displayed. Click **Yes**.

Note: * indicates that the field is mandatory.

The selected UOM is removed from the UOM list.

Manually Add an Instruction to an Item

You can provide instructions pertaining to shipping and storage for an item. You can create a free-form text instruction when there are no preexisting item instruction code or when you want to create a special instruction for an item. For example, if the item is very fragile and requires extra packing, then you may want to create an instruction stating, Make sure that the item is double bubble wrapped.

You can manually add an instruction to an item from the Item Instructions screen.

To manually add an instruction to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Instructions**. The details screen is displayed, with the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. From the **Manage Instructions for type** drop-down list, select an instruction type to view all the instructions pertaining to the selected instruction type. The list displays all the configured item instruction types.
7. In the **Instructions** panel of the Item Instructions screen, perform the following steps:
 - a. Click **Add**.
 - b. The New Instruction dialog box is displayed. In the **Details** area, select the **Enter text manually** radio button.
 - c. In the **Text*** box, enter the instruction text.
 - d. Click **Save**.

Note: * indicates that the field is mandatory.

The instruction is added manually to the item.

Add an Instruction from Existing Instruction Codes to an Item

You can choose to use the predefined set of instruction codes for an item. For example, you may have a preexisting Handle With Care item instruction code that you can associate with fragile items.

You can add an instruction from existing instruction codes from the Item Instructions screen.

To add an instruction from existing instruction codes to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Instructions**.
The details screen is displayed, with the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. From the **Manage Instructions for type** drop-down list, select an instruction type to view all the instructions pertaining to the selected instruction type. The list displays all the configured item instruction types.
7. In the **Instructions** panel of the Item Instructions screen, perform the following steps:
 - a. Click **Add**.
 - b. The New Instruction dialog box is displayed. In the **Details** area, select the **Use existing instruction code** radio button.
 - c. From the drop-down list, select the applicable instruction code.
 - d. Click **Save**.

The instruction from existing instruction codes is added to the item.

Modify an Item's Instruction

You can choose to modify an instruction description, or modify the instruction type from either manual text to a predefined set of instruction or from a predefined set of instruction to a manual text.

You can modify an instruction from the Item Instructions screen.

To modify an item's instruction:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Instructions**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the **Manage Instructions for type** drop-down list, select an instruction type to view all the instructions pertaining to the selected instruction type. The list displays all the configured item instruction types.
 7. In the **Instructions** panel of the Item Instructions screen, perform the following steps:
 - a. Select the instruction row that you want to modify.
The **Details** area is populated with the details of the selected instruction.
 - b. In the **Details** area, make the necessary modifications.
 - c. To modify another instruction, repeat step a to step b.
Note: Do not clear the check box adjacent to an instruction when navigating between instructions.
 8. Click **Save** in the Item Instructions screen.



The item's instruction is modified.

Modify the Sequence of an Instruction

After all the instructions are created for an item, you can rearrange the sequence of the instructions. For example, from a set of instructions for an item you may want the Make sure that the item is double bubble wrapped instruction to be the first instruction.

You can modify the sequence of an instruction from the Item Instructions screen.

To modify the sequence of an instruction:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Instructions**. The details screen is displayed, with the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. From the **Manage Instructions for type** drop-down list, select an instruction type to view all the instructions pertaining to the selected instruction type. The list displays all the configured item instruction types.
7. In the **Instructions** panel of the Item Instructions screen, select the instruction and click  or  to modify the sequence.
8. Click **Save** in the Item Instructions screen.

The sequence of the instruction is modified.

Delete an Instruction from an Item

You can delete instructions that were added manually and instructions that were added from the existing instruction codes. When you delete an instruction that was added manually to an item, the instruction is deleted from the database. However, when you delete an instruction that was added from the existing instruction codes, the instruction is not deleted from the database but only dissociated from the item.

To delete an instruction from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Instructions**.
The details screen is displayed, with the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. From the **Manage Instructions for type** drop-down list, select an instruction type to view all the instructions pertaining to the selected instruction type. The list displays all the configured item instruction types.
7. In the **Instruction** panel of the Item Instructions screen, perform the following steps:
 - a. Select the instruction that you want to remove from the item.
 - b. The row is highlighted, and the **Details** panel is enabled. Click **Delete**.
 - c. A message asking for confirmation is displayed. Click **Yes** to remove the selected instruction from the list.
The instruction is deleted from the item.

Define the Fulfillment Details for Sourcing and Transporting an Item

For an item, you can define fulfillment details such as sourcing information, transportation information, fulfillment methods, node notification time, shipment consolidation window, release time before the shipment, whether freezing is required, whether shipping by air is required, and so on.

You can define all the fulfillment details of an item from the Fulfillment Information screen. The item's sourcing information is displayed under the sourcing area, while the item's transportation information is displayed under the transportation area. For a bundle item type, details about how the bundle item must be shipped and delivered are displayed under the bundle fulfillment area.

To define the fulfillment details for an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Fulfillment Information**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Sourcing** area, perform the following steps:
 - a. In the **Release an order for this item a total of <number of hours> working hours and <number of days> system days before expected time of shipment** box, enter the advance notification time for the item, which is used during the release process. A communication to ship the order must be made to the shipping node or supplier before the defined number of hours and days, which is the maximum number of hours and days, before the expected shipment date.
 - b. In the **Node needs to be notified at least <number of hours> hours prior to expected time of shipment** box, enter the minimum notification time for the item, which is used to determine the earliest ship date on the line. A communication to ship the order must be made before the defined number of days, which is the least number of days, before the expected shipment date.

- c. In the **Item shipment consolidation window** *<number of days> days* box, enter the number of days an item can be delayed after it becomes available to be consolidated as a single shipment. This is used by to schedule items for shipment.
 - a. From the **Assume Infinite Inventory During Promising** drop-down list, select the applicable option.
 - b. From the **Shipping Allowed** drop-down list, select one of the following options to specify if shipping is allowed:
 - Yes: Select this option if shipping is allowed.
 - Only if delivery is not allowed: Select this option if you want to allow shipping only if delivery is not allowed. Ensure that you select No from the **Delivery Allowed** drop-down list after selecting this option.
 - No: Select this option if shipping is not allowed.
 - c. From the **Forwarding Allowed** drop-down list, select the applicable option to specify if the item can be forwarded for zone skipping.
 - d. From the **Delivery Allowed** drop-down list, select one of the following options to specify if delivery is allowed:
 - Yes: Select this option if delivery is allowed.
 - Only if something else is being delivered: Select this option if something else is being delivered. For example, in an order, if the Delivery Allowed option for two items, A and B, are defined as Item A has delivery allowed, and Item B has Only if something else is being delivered, then both Item A and Item B are delivered. However, in an order, if the Delivery Allowed option for two items, A and B, are defined as Item A has no delivery allowed, and Item B has Only if something else is being delivered, then Item B is also not delivered.
 - No: Select this option if delivery is not allowed.
 - e. From the **Procurement Allowed** drop-down list, select the applicable option to specify if the item can be procured for zone skipping.
 - f. From the **Pickup Allowed** drop-down list, select the applicable option to specify if pickup is allowed.
 - g. From the **Item Substitution On Order Allowed** drop-down list, select the applicable option to determine if substitution of item is allowed during scheduling. If the value is Yes, schedule automatically attempts to substitute an item with either the preferred substitute or the regular substitute.

Note: If the item is associated with a classification usage that inherits the item fields and no value is selected in the field, then the value that is inherited from the classification usage is used. This inherited value is displayed as the selected option to the field.
7. In the **Transportation** area, perform the following steps:
- a. From the **Requires Freezer** drop-down list, select the applicable option to specify if the item requires freezer storage during transportation.
 - b. From the **Shipping By Air Allowed** drop-down list, select the applicable option to specify if the item can be shipped by air.

- c. From the **Parcel Shipping Allowed** drop-down list, select the applicable option to specify if parcel shipping is allowed for the transfer of the item.

Note: If the item is associated with a classification usage that inherits the item fields and no value is selected in the field, then the value that is inherited from the classification usage is used. This inherited value is displayed as the selected option to the field.

8. If the item is of type bundle, then in the **Bundle Fulfillment** area, select one of the following radio buttons:

- a. **Ship Together** - Select this radio button to ship all the components in a bundle item together.
- b. **Ship Independently** - Select this radio button to ship all the components in a bundle item independently.
- c. **Deliver Together** - Select this radio button to deliver all the components in a bundle item together.

Note: Ensure that the fulfillment options of a ship together Bundle item is the same for both the parent and component items in the bundle.

9. Click **Save**.

Note: If you do not enter values for the different options, then default values are automatically populated when you click **Save**.

The fulfillment details for sourcing and transporting the item is defined.

Define the Return Fulfillment Details to Accept Item Returns

You can manage the item returns by defining the return fulfillment details such as the number of days within which the item can be returned from the date of purchase (called the Return Window), information about the return shipping label, whether credit without receipt is allowed for the item, and so on.

You can define the return fulfillment details to accept item returns from the Return Fulfillment screen.

To define the return fulfillment details to accept item returns:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Return Fulfillment Information**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the **Accept returns for this item** drop-down list, select any one of the following options:
 - **Yes**, if the item is not associated with any classification usage.
 - **Use Classification Definition (yes)**, if the item is associated with a classification usage.

Note:If the item is associated with a classification usage that inherits the item fields and no value is selected in the field, then the value that is inherited from the classification usage is used. This inherited value is displayed as the selected option to the field.

7. Enter the number of days in the **Allow on when the item is returned within <number of days> day(s) of purchase** text box.

Note:If the item is associated with a classification definition that inherits the item fields, and no value is selected in the field, then the value that is inherited from the classification definition is used. This inherited value is displayed next to the field. If the item is not associated to any classification definition, then the field displays the default value as the selected value.

8. For the **Return shipping label is** option, select any one of the following options:
 - **not required:** select this option if you do not require a return shipping label.
 - **required at SKU level:** select this option if you require return labels for each unit of the item packaged in the container.
 - **required at package level:** select this option if you require return labels for each container in which the item is packed.

9. Select the **Allow credit without receipt for this item** option if you want the customer to receive the credit without any receipt on the returned item.
10. Click **Save**.

The return fulfillment details to accept item returns are defined.

Define the Return Fulfillment Details to Decline Item Returns

You can manage the item returns by defining the return fulfillment details such as the number of days within which the item can be returned from the date of purchase (called the Return Window), information about the return shipping label, whether credit without receipt is allowed for the item, and so on.

You can define the return fulfillment details to decline item returns from the Return Fulfillment screen.

To decline the return fulfillment details to decline item returns:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Return Fulfillment Information**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the **Accept Returns for this Item** drop-down list, select any one of the following options:
 - **No**, if the item is not associated with any classification purpose.
 - **Use Classification Definition (no)**, if the item is associated with a classification purpose.

Note: If the item is associated with a classification purpose that inherits the item fields, and no value is selected in the field, then the value that is inherited from the classification purpose is used. This inherited value is displayed as the selected option to the field.

7. Click **Save**.

The return fulfillment details to decline item returns are defined.

Assign an Attribute Value to an Item Attribute

An attribute defines an item's characteristic or specification. All the attributes that are associated with an item are displayed on the Item Attributes screen, with each of the attribute group displayed as a panel, and all the attributes belonging to a particular attribute group displayed within that panel.

You can assign a value to an item attribute. Each attribute is associated with a particular data type. The available data types for an attribute are described in the following table:

Data type	Description
Text	A free-formed text or a list of values from which you can select one or more.
Number	It can be any number, an integer, a floating value, and so on. A number can be associated with a postfix. For example, the Screen Size attribute can have a value of 26 inches. The numeral 26 is the number attribute value, and <i>inches</i> is the postfix. The postfix is always displayed next to the text box in which the value is displayed.
Boolean	The valid values are either True/False or Yes/No. Usually, these data types are displayed as a radio button.

You can assign an attribute value to an item attribute from the Item Attributes screen.


To assign an attribute value to an item attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Attribute Values**.

The Item Attributes screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the **Manage attributes used for** drop-down list, select the attribute usage type.
Note: If the number of attribute usage types in the **Manage attributes used for** drop-down list is greater than thirty, a text box will be displayed instead of the drop-down list.
 7. The screen is populated with details of only the attributes that belong to the selected usage type. The panels and fields displayed on the screen depend on the item type you are viewing and the attributes defined when creating the item.
 8. Depending on the data type, you can perform one or more of the following steps to assign an attribute value to an item attribute:

- If it is a text data type, enter the value in the respective field.

Note: When the number of allowed values defined for a text attribute is less than or equal to 30, a drop-down list is displayed. If the number of text attribute value exceeds 30, the drop-down list is replaced by a text box with a search icon. You can use this search icon to search for a text attribute value. When you click the search icon, the **Allowed Values Search** dialog box is displayed. Enter the text attribute value or the text attribute value description to search for a text attribute value, and click **Search**. A list of allowed values that matches your search criteria is displayed. Select the required text attribute value, and click Select. Use  adjacent to the search icon to clear the existing text attribute value.

- If it is a Boolean data type, select or clear the respective check box.
- If it is a number data type, enter the value in the respective field.

Note: Although there are three basic data types, the way each of these is displayed depends on how the attributes are configured in the Attribute Management. Example - for a number data type, the values may be listed as a drop-down list, instead of a text box.

9. Click **Save**.

The attribute value is assigned to the item attribute.

Override an Attribute Value of an Item Attribute

The value of an attribute can be overridden if the attribute value is not inherited from the category.

You can override an attribute value of an item attribute from the Item Attributes screen.

To override an attribute value of an item attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Attribute Values**.


The Item Attributes screen is displayed, with the following read-only text boxes:

- Short Description
- Item Characteristic
- Status

6. From the **Manage attributes used for** drop-down list, select the attribute usage type.

Note: If the number of attribute usage types in the **Manage attributes used for** drop-down list is greater than thirty, a text box will be displayed instead of the drop-down list.

7. The screen is populated with details of only the attributes that belong to the selected usage type. The panels and fields displayed on the screen depend on the item type you are viewing and the attributes defined when creating the item.
8. Click the **Override** link adjacent the attribute value you want to override.
9. A drop-down list containing the assigned values is enabled. Select the required attribute value.

Note: When the number of allowed values defined for a text attribute is less than or equal to 30, a drop-down list is displayed. If the number of text attribute value exceeds 30, the drop-down list is replaced by a text box with a search icon. You can use this search icon to search for a text attribute value. When you click the search icon, the **Allowed Values Search** dialog box is displayed. Enter the text attribute value or the text attribute value description to search for a text attribute value, and click **Search**. A list of allowed values that matches your search criteria is displayed. Select the required text attribute value, and click **Select**. Use  adjacent to the search icon to clear the existing text attribute value.

10. Click **Save**.

The attribute value of the item attribute is overridden.

Modify the Attribute Value of an Item Attribute


You can modify the assigned values of an item attribute with the corresponding data types.

To modify the attribute value of an item attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Attribute Value**.

The Item Attributes screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the **Manage attributes used for** drop-down list, select the attribute usage type.
Note: If the number of attribute usage types in the **Manage attributes used for** drop-down list is greater than thirty, a text box will be displayed instead of the drop-down list.
 7. The screen is populated with details of only the attributes that belong to the selected usage type. The panels and fields displayed on the screen depend on the item type you are viewing and the attributes defined when creating the item.
 8. Depending on the data type, you can perform the following to modify the attribute value:
 - If it is a text data type, enter the new value in the respective field.

Note: When the number of allowed values defined for a text attribute is less than or equal to 30, a drop-down list is displayed. If the number of text attribute value exceeds 30, the drop-down list is replaced by a text box with a search icon. You can use this search icon to search for a text attribute value. When you click the search icon, the **Allowed Values Search** dialog box is displayed. Enter the text attribute value or the text attribute value description to search for a text attribute value, and click **Search**. A list of allowed values that matches your search criteria is displayed. Select the required text attribute value, and click **Select**. Use  adjacent to the search icon to clear the existing text attribute value.

- If it is a Boolean data type, select or clear the respective check box.
- If it is a number data type, enter the new value in the respective field.

Note: Although there are three basic data types, the way each of these is displayed depends on how the attributes are configured in the Attribute Management. Example - for a number data type, the values may be listed as a drop-down list, instead of a text box.

9. Click **Save**.

The attribute value of the item attribute is modified.

Assign Multiple Attribute Values to an Item Attribute

For some attributes, you can assign multiple values. For example, because multiple port types, such as USB, cable, and so on exist, you can assign multiple values to the port attribute.

You can assign multiple attribute values to an item attribute from the Item Attributes screen.

To assign multiple attribute values to an item attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Attribute Values**.


The Item Attributes screen is displayed, with the following read-only text boxes:

- Short Description
- Item Characteristic
- Status

6. From the **Manage attributes used for** drop-down list, select the attribute usage type.

Note: If the number of attribute usage types in the **Manage attributes used for** drop-down list is greater than thirty, a text box will be displayed instead of the drop-down list.

7. The screen is populated with details of only the attributes that belong to the selected usage type. The panels and fields displayed on the screen depend on the item type you are viewing and the attributes defined when creating the item.
8. Click the **Modify** link adjacent the attribute. Note that only those attributes that can be assigned multiple values have the **Modify** link.
9. A dialog box with a list of available values is displayed. Perform the following steps:
 - a. Click the **Add Another Value** link to add a new attribute value row.
 - b. From the drop-down list, select an attribute value. The list displays all the values that were defined in Attribute Management screen.

Note: When the number of allowed values defined for a text attribute is less than or equal to 30, a drop-down list is displayed. If the number of text attribute value exceeds 30, the drop-down list is replaced by a text box with a search icon. You can use this search icon to search for a text attribute value. When you click the search icon, the **Allowed Values Search** dialog box is displayed. Enter the text attribute value or the text attribute value description to search for a text attribute value, and click **Search**. A list of allowed values that matches your search criteria is displayed. Select the required text attribute value, and click **Select**. Use  adjacent to the search icon to clear the existing text attribute value.

- c. Repeat steps a and b to add more values for the attribute.
- 10. Click **Select** to assign the new attribute values and close the dialog box.
- 11. Click **Save**.

The multiple attribute values are assigned to the item attribute.

Assign Values to the Extended Fields for an Item



You can specify the values for all the extended fields from the Extended Fields screen.

The extended fields displayed on the Extended Fields screen are populated from the YFS_ITEM table. All the columns from the extended YFS_ITEM table are displayed as fields on the Extended Fields screen.

To assign values to the extended fields for an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Extended Fields**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. Enter the values for the extended fields that are displayed. However, if the extended field is associated to a Classification Usage,  is displayed adjacent an extended field. Click . A dialog box with the classification values for the extended field is displayed. Perform the following steps:
 - a. Select a classification value from the tree.
 - b. Click **Select** to select the classification and close the dialog box.

The classification value is displayed in the boxes pertaining to extended fields.

7. Click **Save**.

The values to the extended fields are assigned to an item.

Configuring the Inventory for a Tagged Item

You can configure the item's inventory for tagged items. A tag number is used to identify an item in the system regardless of the inventory identification numbers you use for example, lot number and revision number. Inventory identification numbers are used to differentiate products within inventory because different item instances have different characteristics. Some common examples of identification numbers are lot number, revision number, and manufacturing batch number. While an organization may have multiple inventory identification numbers, these identification numbers are not necessarily relevant to every product in the organization's catalog. For some products, a lot number uniquely defines all the characteristics, whereas a revision number differentiates another product. An inventory tag number is used to rationalize such situations. In most cases, the tag number represents one of the inventory identification numbers such as lot number, batch number, or revision number based on the product. Let us consider an example where you have two different items, Item A, which is uniquely identified by a lot number, and Item B, which is uniquely identified by a revision number. In this case, when an instance of Item A is created with the lot number of 12345, it is also assigned a tag number of 12345. When an instance of Item B is created with a revision number of 98765, the item is also assigned the tag number of 98765.

You can configure the inventory details for a tagged item from the Inventory Fields screen.

Configure the Inventory for a Tagged Item

To configure the inventory of a tagged item:



1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Inventory Info**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Promising** area, perform the following steps:
 - a. Select an **ATP Rule** from the drop-down list. The parameters defined in the selected ATP rules are used to determine the available inventory for this item.



If the item is associated with the classification definition that inherits the item fields, and an ATP Rule option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.

- b. Select an **ATP Monitor Rule** from the drop-down list. The minimum inventory levels for this item are based on the parameters set up for the selected ATP Monitor rule.
 - c. If the item is associated with the classification definition that inherits the item fields, and the ATP Monitor Rule option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.
 - d. Select a **Node Level ATP Monitor Rule** from the drop-down list. The minimum inventory levels for this item are based on the parameters set up for the selected Node Level ATP Monitor rule.
 - e. If the item is associated with the classification definition that inherits the item fields, and a Node Level ATP Monitor Rule option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.
 - f. Select a **Use Unplanned Inventory** from the drop-down list to allow the unplanned inventory pertaining to this item to be used.
 - g. If the item is associated with the classification definition that inherits the item fields, and a Use Unplanned Inventory option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.
 - h. Select an **Item Based Allocation Allowed** from the drop-down list to allow item-based allocation for an item from the drop-down list. When the Use Item Based Allocation rule is enabled, the item-based allocation is applicable only for the items and nodes that have the Item Based Allocation Allowed attribute enabled.
 - i. If the item is associated with the classification definition that inherits the item fields, and an Item Based Inventory Allocation Allowed option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.
 - j. In the **Lead Days** text box, enter the lead days for getting the product delivered. For example, if you enter lead days as 3, then a Purchase Order placed today arrives at the warehouse after three days.
Note: If you do not enter any value in the box, then the value is inherited from the classification definition.
 - k. In the **Onhand Safety Factory** box, enter a value for the Onhand Safety Factory, and select either the percent or the units option.
Note: If you do not enter any value in the box, then the value is inherited from the classification definition.
 - l. In the **Future Safety Factor Percentage** box, enter the percentage of inventory for this item that you want to exclude from future inventory availability.
Note: If you do not enter any value in the box, then the value is inherited from the classification definition.
7. In the **Inventory Attributes** area, perform the following steps:
- a. In the **Default Product Class** text box, enter the default product class for the item.
Note: If you do not enter any value in the box, then the value is inherited from the classification definition.
 - b. Select the **Serialized** check box to enable location-level tracking by serial number.

- c. Select the **Serial Tracked** check box to ensure that serial numbers are captured by the system during the outbound and return processes.
 - d. In the **Number of Secondary Serials** box, enter the number (0-9) of secondary serial numbers you want to use for tracking by serial number.
 - e. Select a **Track FIFO in Inventory** from the drop-down list. This indicates that inventory is tracked using the First In First Out (FIFO) number, which is automatically generated by the system.
 - f. If the item is associated with the classification definition that inherits the item fields, and a Track FIFO in Inventory option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.
 - g. From the **Primary Supplier** drop-down list, select the primary supplier for the item.
 - h. Select the **Time Sensitive** check box if the item can last only for a limited period of time. If you have selected the **Time Sensitive** check box, then enter the **Default Expiration Days**.
8. In the **Tag Control** area, select either of the following radio buttons:
- **Sometimes Tag Controlled** - Select this radio button if you want to be able to assign a tag number to identify an item in special circumstances, such as customer pickup.
 - **Always Tag Controlled** - Select this radio button if you always want to use a tag number to uniquely identify different instances of this item in the system.
- Note:** When you click the **Always Tag Controlled** radio button, ensure that you configure the tag identifiers for the item.
- The inventory module uses the tag control flag to determine if any additional inventory attributes must be stored for the item.
9. In the **Tag Identifiers** area, click **Configure**.
10. The Configure Tag Identifiers dialog box is displayed. From the **Available Identifiers** list, select the identifiers you want to assign to the item. The combination of the tag identifiers generates the tag number that the system uses to identify tag-controlled items.
11. Click . To add all the available identifiers to the **Selected Identifiers** list, click .
12. The selected identifiers are moved to the **Selected Identifiers** list. Click **Select**.
13. The selected identifiers are added to the **Tag Identifiers** list. In the Item Inventory screen, click **Save**.
- After you have configured the tag identifiers for the item, [Configure the Tag Attributes for Tag Identifiers](#)

Configure the Tag Attributes for Tag Identifiers

1. In the **Tag Attributes** area, click **Configure**.
2. The Configure Tag Attributes dialog box is displayed. From the **Available Attributes** list, select the attributes that you want to assign to the tag. The tag attributes do not generate a tag number. They are used for informational purposes, and only the attributes that have been selected are displayed in the application.

3. Click . To add all the available attributes to the **Selected Attributes** list, click .
4. The selected attributes are moved to the **Selected Attributes** list. Click **Select**.
5. The selected attributes is added to the **Tag Attributes** list. In the Item Inventory screen, click **Save**.
6. Repeat steps 1 through 6 to configure attributes of other tags.
The inventory for the tagged item is configured.

Configure the Inventory for a Nontagged Item

You can manage the nontagged item's inventory from the inventory fields. The overall inventory picture provides a customer with information about an item's availability and demand. This information can also be used to determine how long it takes to process the item and, if applicable, how long before the item expires.

You can manage the item's inventory for the nontagged items.

You can configure the inventory details for a nontagged item from the Inventory Fields screen.

To configure the inventory of a nontagged item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Inventory Info**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
- a. Select an **ATP Rule** from the drop-down list. The parameters defined in the selected ATP rules are used to determine the available inventory for this item.

If the item is associated with the classification definition that inherits the item fields, and an ATP Rule option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.
 - b. Select an **ATP Monitor Rule** from the drop-down list. The minimum inventory levels for this item are based on the parameters set up for the selected ATP Monitor rule.
 - c. If the item is associated with the classification definition that inherits the item fields, and the ATP Monitor Rule option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.
 - d. Select a **Node Level ATP Monitor Rule** from the drop-down list. The minimum inventory levels for this item are based on the parameters set up for the selected Node Level ATP Monitor rule.
 - e. If the item is associated with the classification definition that inherits the item fields, and a Node Level ATP Monitor Rule option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.
 - f. Select a **Use Unplanned Inventory** from the drop-down list to allow the unplanned inventory pertaining to this item to be used.

- g. If the item is associated with the classification definition that inherits the item fields, and a **Use Unplanned Inventory** option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.
 - h. Select an **Item Based Allocation Allowed** from the drop-down list to allow item-based allocation for an item from the drop-down list. When the Use Item Based Allocation rule is enabled, the item-based allocation is applicable only for the items and nodes that have the Item Based Allocation Allowed attribute enabled.
 - i. If the item is associated with the classification definition that inherits the item fields, and an Item Based Inventory Allocation Allowed option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.
 - j. In the **Lead Days** text box, enter the lead days for getting the product delivered. For example, if you enter lead days as 3, then a Purchase Order placed today arrives at the warehouse after three days.
Note: If you do not enter any value in the box, the value is inherited from the classification definition.
 - k. In the **Onhand Safety Factory** box, enter a value for the Onhand Safety Factory, and select either the percent or the units option.
Note: If you do not enter any value in the box, the value is inherited from the classification definition.
 - l. In the **Future Safety Factor Percentage** box, enter the percentage of inventory for this item that you want to exclude from future inventory availability.
Note: If you do not enter any value in the box, then the value is inherited from the classification definition.
6. In the **Inventory Attributes** area, perform the following steps:
- a. In the **Default Product Class** text box, enter the default product class for the item.
Note: If you do not enter any value in the box, the value is inherited from the classification definition.
 - b. Select the **Serialized** check box to enable location-level tracking by serial number.
 - c. Select the **Serial Tracked** check box to ensure that serial numbers are captured by the system during the outbound and return processes.
 - d. In the **Number of Secondary Serials** box, enter the number (0-9) of secondary serial numbers you want to use for tracking by serial number.
 - e. Select a **Track FIFO in Inventory** from the drop-down list. This indicates that inventory is tracked using the First In First Out (FIFO) number, which is automatically generated by the system.
 - f. If the item is associated with the classification definition that inherits the item fields, and a Track FIFO in Inventory option is not selected, then by default, the **Use Classification Definition <Value selected in the Classification Definition>** option is selected.
 - g. From the **Primary Supplier** drop-down list, select the primary supplier for the item.
 - h. Select the **Time Sensitive** check box if the item can last only for a limited period of time. If you have selected the **Time Sensitive** check box, then enter the **Default Expiration Days**.

7. In the **Tag Control** area, select the **Not Tag Controlled** radio button if you do not want to use a tag number to uniquely identify this item in the system.

8. Click **Save**.

The inventory for the nontagged item is configured.

Associate a Cross-Sell Item to an Item

You can associate a cross-sell item to an existing item to promote an add-on or accessory item, which when combined with the original item makes a better package. For example, for a Television item you can associate a DVD player as a cross-sell item. A DVD player along with a Television provides a better package for the customer.


You can associate a cross-sell item to an item from the Item Associations screen.

To associate a cross-sell item to an item:



1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, select **Manage Cross-Sells**.

The Items Associations screen is displayed. The **Cross-Sell Associations** panel displays the following read-only text boxes:

- Short Description
- Item Characteristic
- Status

6. In the **Items** area that is displayed, click **Add**.
7. The Add Association Item dialog box is displayed. Perform the following steps:
 - a. In the **Item ID* box**, click  to search for an Item ID. The Basic Item Search dialog box is displayed. Enter the search criteria, and click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed. In the search results list that is displayed, select the item that you want to associate as an alternative item, and click **Select**.

Note: A bundle item cannot be associated to any other item.

 - b. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.
 - c. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
 - d. In the **Associated Quantity*** text box, enter the quantity of the associated item that is relevant to this association.

- e. In the **Priority** field, enter the priority of the associated item. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.
- f. Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The cross-sell item is associated with the item.

Modify the Cross-Sell Item's Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify a cross-sell item's details from the Item Associations screen.

To modify a cross-sell item's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item whose details you want to modify.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Cross-Sells**.

The Items Associations screen is displayed. The **Cross-Sell Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the check box adjacent the item whose details you want to modify, and click **Modify**.
 7. The Modify Association Item dialog box is displayed. Perform the following modifications:
 - Select a new **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.
 - Select a new **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
 - In the **Associated Quantity*** text box, enter a new quantity for the associated item that is relevant to this association.
 - In the **Priority** field, enter a new priority for the associated item. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The cross-sell item details are modified.

Dissociate a Cross-Sell Item from an Item

You can dissociate a cross-sell item from an existing item if you do not want this association in order to promote an add-on or accessory item, which when combined with the original item makes a better package.

To dissociate a cross-sell item from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, select **Manage Cross-Sells**.

The Items Associations screen is displayed. The **Cross-Sell Associations** panel displays the following read-only text boxes:




- Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the item that you want to disassociate from an item.
 7. Click **Remove**.
 8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the item.
The selected item is dissociated from the item.

Associate a Category to an Item for a Cross-Sell Association

You can associate a category to an item so that all the items in the category are associated to the item as cross-sell items.

You can associate a category to an item for a cross-sell association from the Item Associations screen.

To associate a category to an item for a cross-sell association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Cross-Sells**. The Item Associations screen is displayed. The **Cross-Sell Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Cross-Sell Associations** panel, click the **Category** tab.
7. In the **Category** area that is displayed, click **Add**.
8. The Add Association Category dialog box is displayed. Perform the following steps:
 - a. In the **Category ID*** box, click  to select the category. The **Tree** panel is displayed. Select the category that you want to associate, and click **Select**.
 - b. Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - c. Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - d. Click **Save** to save the details, and close the dialog box.
9. Click **Save**.

Note: * indicates that the field is mandatory.



The category is associated to the item for a cross-sell association.

Modify the Effective Date Range of a Category for a Cross-Sell Association

You can modify the effective date range of a category associated to an item in a cross-sell association. The effective date range indicates the duration for which the items in a category will be considered as cross-sell items.

You can modify the effective date range of a category for a cross-sell association from the Item Associations screen.

To modify the effective date range of a category for a cross-sell association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Cross-Sells**. The Item Associations screen is displayed. The **Cross-Sell Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Cross-Sell Associations** panel, click the **Category** tab.
7. In the **Category** area that is displayed, select the check box adjacent the category whose details you want to modify, and click **Modify**.
8. The Modify Association Category dialog box is displayed. Perform the following modifications:
 - Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - Click **Save** to save the details, and close the dialog box.
9. Click **Save**.

Note: * indicates that the field is mandatory.

The effective date range of a category for a cross-sell association is modified.

Dissociate a Category from an Item for a Cross-Sell Association

You can dissociate a category from an item if you do not want to associate all the items in the category to the item as cross-sell items.

To dissociate a category from an item for a cross-sell association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Cross-Sells**. The Item Associations screen is displayed. The **Cross-Sell Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Cross-Sell Associations** panel, click the **Category** tab.
7. In the **Category** area that is displayed, select the category that you want to dissociate from the item.
8. Click **Remove**.
9. A message asking you for confirmation is displayed. Click **Yes** to dissociate the category. The selected category is disassociated from the item.


Associate an Up-Sell Item to an Item



You can assign an alternative item that is of a higher value as compared to the original item. Such an alternative item is called an up-sell item.

For example, in the inventory you may have books with two binding types: hard bound and book bound. When you create a catalog item for the book with book bound type of binding, you can associate the hard-bound book, which is more expensive, as an up-sell item. When the customer orders the book of book-bound type, you can notify the customer about the hard-bound book.

You can associate an up-sell item to an item from the Item Associations screen.

To associate an up-sell item to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item.
5. The **Primary Information** panel is displayed. In the **Related Tasks** panel, click **Manage Up-Sells**. The Items Associations screen is displayed. The **Up-Sells Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, click **Add**.
7. The Add Association Item dialog box is displayed. Perform the following steps:
 - a. In the **Item ID*** box, click  to search for an Item ID. The Basic Item Search dialog box is displayed. Enter the search criteria, and click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed. In the search results list that is displayed, select the item that you want to associate as an alternative item, and click **Select**.

Note: A bundle item cannot be associated to any other item.
 - b. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.
 - c. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
 - d. In the **Associated Quantity*** text box, enter the quantity of the associated item that is relevant to this association.

- e. In the **Priority** field, enter the priority of the associated item. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.
- f. Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The up-sell item is associated to the item.

Modify the Up-Sell Item's Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify an up-sell item's details from the Item Associations screen.

To modify an up-sell item's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Up-Sells**.

The Items Associations screen is displayed. The **Up-Sells Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the check box adjacent the item whose details you want to modify, and click **Modify**
 7. The Modify Association Item dialog box is displayed. Perform the following modifications:
 - Select a new **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.
 - Select a new **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
 - In the **Associated Quantity*** text box, enter a new quantity for the associated item that is relevant to this association.
 - In the **Priority** field, enter a new priority for the associated item. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The up-sell item's details are modified.

Dissociate an Up-Sell Item from an Item

To dissociate an up-sell item from an item:




1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item.
5. The **Primary Information** panel is displayed. In the **Related Tasks** panel, click **Manage Up-Sells**. The Items Associations screen is displayed. The **Up-Sell Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the item that you want to disassociate from an item.
7. Click **Remove**.
8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the item. The selected item is dissociated from the item.

Associate a Category to an Item for an Up-Sell Association

You can associate a category to an item so that all the items in the category are associated to the item as up-sell items.

You can associate a category to an item for an up-sell association from the Item Associations screen.

To associate a category to an item for an up-sell association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item.
5. The **Primary Information** panel is displayed. In the **Related Tasks** panel, click **Manage Up-Sells**. The Items Associations screen is displayed. The **Up-Sells Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Up-Sells Associations** panel, click the **Category** tab.
7. In the **Category** area that is displayed, click **Add**.
8. The Add Association Category dialog box is displayed. Perform the following steps:
 - a. In the **Category ID*** box, click  to select the category. The **Tree** panel is displayed. Select the category that you want to associate, and click **Select**.
 - b. Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - c. Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - d. Click **Save** to save the details, and close the dialog box.
9. Click **Save**.

Note: * indicates that the field is mandatory.



The category is associated to the item for an up-sell association.

Modify the Effective Date Range of a Category for an Up-Sell Association

You can modify the effective date range of a category associated to an item in an up-sell association. The effective date range indicates the duration for which the items in a category will be considered as up-sell items.

You can modify the effective date range of a category for an up-sell association from the Item Associations screen.

To modify the effective date range of a category for an up-sell association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Up-Sells**.
The Item Associations screen is displayed. The **Up-Sell Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Up-Sell Associations** panel, click the **Category** tab.
7. In the **Category** area that is displayed, select the check box adjacent the category whose details you want to modify, and click **Modify**.
8. The Modify Association Category dialog box is displayed. Perform the following steps:
 - Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - Click **Save** to save the details, and close the dialog box.
9. Click **Save**.

Note: * indicates that the field is mandatory.

The effective date range of a category for an up-sell association is modified.

Dissociate a Category from an Item for an Up-Sell Association

You can dissociate a category from an item if you do not want to associate all the items in the category to the item as up-sell items.

To dissociate a category from an item for an up-sell association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item.
5. The **Primary Information** panel is displayed. In the **Related Tasks** panel, click **Manage Up-Sells**. The Items Associations screen is displayed. The **Up-Sells Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Up-Sells Associations** panel, click the **Category** tab.
7. In the **Category** area that is displayed, select the category that you want to dissociate from the item.
8. Click **Remove**.
9. A message asking you for confirmation is displayed. Click **Yes** to dissociate the category. The selected category is disassociated from the item.

Associate a Supersession Item to an Item

You can set up a supersession association for an item to indicate that the item can be superseded by one or more items. When the effective date of an item becomes obsolete, the original item is automatically replaced by the item that is associated to supersede the original item. For example, you can configure item A to be superseded by item B, which in turn can be superseded by item C; however, you cannot specify that both items B and C should directly supersede item A.

When you are configuring a supersession for an item, it is a good practice to specify items that are similar and are comparably-priced to the item that is being superseded.



You can associate a supersession item to an item from the Item Association screen.


Note: A parent bundle item type cannot have an individual item as a supersession item.

To associate a supersession item to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Supersessions**.

The Items Associations screen is displayed. The **Supersession Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, click **Add**.
 7. The Add Association Item dialog box is displayed. Perform the following steps:
 - a. In the **Item ID* box**, click  to search for an Item ID. The Basic Item Search dialog box is displayed. Enter the search criteria, and click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed. In the search results list that is displayed, select the item that you want to associate as an alternative item, and click **Select**.
- Note:** A bundle item cannot be associated to any other item.
- b. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.

- c. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
- d. In the **Associated Quantity*** text box, enter the quantity of the associated item that is relevant to this association.
- e. In the **Priority** field, enter the priority of the associated item. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.
- f. Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The supersession item is associated to the item.

Modify the Supersession Item's Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify a supersession item's details from the Item Associations screen.

To modify a supersession item's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Supersessions**.

The Items Associations screen is displayed. The **Supersession Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the check box adjacent the item whose details you want to modify, and click **Modify**.
 7. The Modify Association Item dialog box is displayed. Perform the following modifications:
 - Select a new **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.
 - Select a new **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
 - In the **Associated Quantity*** text box, enter a new quantity for the associated item that is relevant to this association.
 - In the **Priority** field, enter a new priority for the associated item. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The supersession item's details are modified.

Dissociate a Supersession Item from an Item

To dissociate a supersession item from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Supersessions**.

The Items Associations screen is displayed. The **Supersession Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the item that you want to disassociate from an item.
 7. Click **Remove**.
 8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the item.
The selected item is dissociated from the item.

Associate a Category to an Item for a Supersession Association

You can associate a category to an item so that all the items in the assigned category are associated to the existing item, which can supersede the original item when its effective date becomes obsolete




You can associate a category to an item for a supersession association from the Item Associations screen.

You can manage the category of an item for a suppression from the Item Associations screen.

To associate a category to an item for a suppression association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Supersessions**.

The Items Associations screen is displayed. The **Supersession Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Supersession Associations** panel, click the **Category** tab.
 7. In the **Category** area that is displayed, click **Add**.
 8. The Add Association Category dialog box is displayed. Perform the following steps:
 - a. In the **Category ID*** box, click  to select the category. The **Tree** panel is displayed. Select the category that you want to associate, and click **Select**.
 - b. Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - c. Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - d. Click **Save** to save the details, and close the dialog box.
 9. Click **Save**.

Note: * indicates that the field is mandatory.

The category is associated to the item for a supersession association.

Modify the Effective Date Range of a Category for a Supersession Association



You can modify the effective date range of a category associated to an item in a supersession association. The effective date range indicates the duration for which the items in a category will be considered as supersession items.

You can modify the effective date range of a category for a supersession association from the Item Associations screen.

To modify the effective date range of a category for a supersession association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Supersession**.

The Item Associations screen is displayed. The **Supersession Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Category** area that is displayed, select the check box adjacent the category whose details you want to modify, and click **Modify**.
 7. In the **Category** area that is displayed, click **Modify**.
 8. The Modify Association Category dialog box is displayed. Perform the following steps:
 - Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - Click **Save** to save the details, and close the dialog box.
 9. Click **Save**.

Note: * indicates that the field is mandatory.

The effective date range of a category for a supersession association is modified.

Dissociate a Category from an Item for a Supersession Association

You can dissociate a category from an item if you do not want to associate all the items in the category to the item for a suppression association.

To dissociate a category from an item for a suppression association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Supersessions**.

The Items Associations screen is displayed. The **Supersession Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Supersession Associations** panel, click the **Category** tab.
 7. In the **Category** area that is displayed, select the category that you want to dissociate from the item.
 8. Click **Remove**.
 9. A message asking you for confirmation is displayed. Click **Yes** to dissociate the category.
The selected category is disassociated from the item.

Associate a Preferred Substitution Item to an Item

A preferred substitute is an item that must be fulfilled prior to fulfilling the original item, in an order. The system verifies and fulfills the order by shipping the preferred substitute item even when the original item is available. For example, if an order is placed for Item1, and the preferred substitute is Item2, then Item2 is depleted prior to shipping Item1.


Note: You cannot use a tag-controlled item as a preferred substitute.

You can associate a preferred substitution item to an item from the Item Associations screen.



To associate a preferred substitution item to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Preferred Substitutions**.

The Items Associations screen is displayed. The **Preferred Substitution Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, click **Add**.
 7. The Add Association Item dialog box is displayed. Perform the following steps:
 - a. In the **Item ID*** box, click  to search for an Item ID. The Basic Item Search dialog box is displayed. Enter the search criteria, and click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed. In the search results list that is displayed, select the item that you want to associate as an alternative item, and click **Select**.

Note: A bundle item cannot be associated to any other item.

 - b. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.
 - c. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
 - d. In the **Associated Quantity*** text box, enter the quantity of the associated item that is relevant to this association.

- e. In the **Priority** field, enter the priority of the associated item. An association with the highest priority is displayed first in the list of associations displayed in Sterling Web application.
- f. Click **Save** to save the details, and close the dialog box.

Notes:

- * indicates that the field is mandatory.
- Items with the highest priority are considered first when the item is automatically substituted during scheduling.

The preferred substitution item is associated to the item.

Modify the Preferred Substitution Item's Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify a preferred substitution item's details from the Item Associations screen.

To modify a preferred substitution item's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Preferred Substitutions**.

The Items Associations screen is displayed. The **Preferred Substitution Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the check box adjacent the item whose details you want to modify, and click **Modify**.
 7. The Modify Association Item dialog box is displayed. Perform the following modifications:
 - Select a new **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.
 - Select a new **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
 - In the **Associated Quantity*** text box, enter a new quantity for the associated item that is relevant to this association.
 - In the **Priority** field, enter a new priority for the associated item. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The preferred substitution item's details are modified.

Dissociate a Preferred Substitution Item from an Item

To dissociate a preferred substitution item from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Preferred Substitutions**.

The Items Associations screen is displayed. The **Preferred Substitution Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the item that you want to disassociate from an item.
 7. Click **Remove**.
 8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the item.
The selected item is dissociated from the item.

Associate a Category to an Item for a Preferred Substitution Association




You can associate a category to an item so that all the items in the assigned category are associated to the existing item as preferred substitutes.

You can associate a category to an item for a preferred substitution association from the Item Associations screen.

To associate a category to an item for preferred substitution association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Preferred Substitutions**.

The Items Associations screen is displayed. The **Preferred Substitution Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Preferred Substitution Associations** panel, click the **Category** tab.
 7. In the **Category** area that is displayed, click **Add**.
 8. The Add Association Category dialog box is displayed. Perform the following steps:
 - a. In the **Category ID*** box, click  to select the category. The **Tree** panel is displayed. Select the category that you want to associate, and click **Select**.
 - b. Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - c. Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - d. Click **Save** to save the details, and close the dialog box.
 9. Click **Save**.

Note: * indicates that the field is mandatory.

The category is associated to the item for a preferred substitution association.

Modify the Effective Date Range of a Category for a Preferred Substitution Association



You can modify the effective date range of a category associated to an item in a preferred substitution association. The effective date range indicates the duration for which the items in a category will be considered as preferred substitution items.

You can modify the effective date range of a category for a preferred substitution association from the Item Associations screen.

To modify the effective date range of a category for a preferred substitution association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Preferred Substitutions**.

The Item Associations screen is displayed. The **Preferred Substitution Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Category** area that is displayed, select the check box adjacent the category whose details you want to modify, and click **Modify**.
 7. In the **Category** area that is displayed, click **Modify**.
 8. The Modify Association Category dialog box is displayed. Perform the following steps:
 - Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - Click **Save** to save the details, and close the dialog box.
 9. Click **Save**.

Note: * indicates that the field is mandatory.

The effective date range of a category for a preferred substitution association is modified.

Dissociate a Category from an Item for a Preferred Substitution Association

You can dissociate a category from an item if you do not want to associate all the items in the category to the item for a preferred substitution association.

To dissociate a category from an item for a preferred substitution association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Preferred Substitutions**.

The Items Associations screen is displayed. The **Preferred Substitution Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Preferred Substitution Associations** panel, click the **Category** tab.
 7. In the **Category** area that is displayed, select the category that you want to dissociate from the item.
 8. Click **Remove**.
 9. A message asking you for confirmation is displayed. Click **Yes** to dissociate the category.
The selected category is disassociated from the item.


Associate an Alternative Item to an Item

For an item, you can set up an alternative item so that you have the option of selecting an item that is very similar to the original as an alternative. When a customer places an order for the original item and the original item is not in stock, then the customer is provided an option to select an alternative item and place an order.



You can associate an alternative item to an item from the Item Associations screen.

Note: A parent bundle item type cannot have an individual item as an alternate item.

To associate an alternative item to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Alternative**. The Items Associations screen is displayed. The **Alternate Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, click **Add**.
7. The Add Association Item dialog box is displayed. Perform the following steps:
 - a. In the **Item ID* box**, click  to search for an Item ID. The Basic Item Search dialog box is displayed. Enter the search criteria, and click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed. In the search results list that is displayed, select the item that you want to associate as an alternative item, and click **Select**.

Note: A bundle item cannot be associated to any other item.

 - b. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.
 - c. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
 - d. In the **Associated Quantity*** text box, enter the quantity of the associated item that is relevant to this association.

- e. In the **Priority** field, enter the priority of the associated item. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.
- f. Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The alternative item is associated to the item.

Modify the Alternative Item's Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify an alternative item's details from the Item Associations screen.

To modify an alternative item's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Alternative**.

The Items Associations screen is displayed. The **Alternate Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the check box adjacent the item whose details you want to modify, and click **Modify**.
 7. The Modify Association Item dialog box is displayed. Perform the following modifications:
 - Select a new **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.
 - Select a new **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
 - In the **Associated Quantity*** text box, enter a new quantity for the associated item that is relevant to this association.
 - In the **Priority** field, enter a new priority for the associated item. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The alternative item's details are modified.

Dissociate an Alternative Item from an Item

To dissociate an alternative item from an item:




1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Alternative**. The Items Associations screen is displayed. The **Alternate Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the item that you want to disassociate from an item.
7. Click **Remove**.
8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the item.
The selected item is dissociated from the item.

Associate a Category to an Item for an Alternative Association

You can assign a category to an item so that all the items in the assigned category are associated to the existing item as alternative items.

You can associate a category to an item for an alternative association from the Item Associations screen.

To associate a category to an item for an alternative association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Alternative**. The Items Associations screen is displayed. The **Alternate Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Alternate Associations** panel, click the **Category** tab.
7. In the **Category** area that is displayed, click **Add**.
8. The Add Association Category dialog box is displayed. Perform the following steps:
 - a. In the **Category ID*** box, click  to select the category. The **Tree** panel is displayed. Select the category that you want to associate, and click **Select**.
 - b. Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - c. Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - d. Click **Save** to save the details, and close the dialog box.
9. Click **Save**.

Note: * indicates that the field is mandatory.



The category is associated to the item for an alternative association.

Modify the Effective Date Range of a Category for an Alternative Association

You can modify the effective date range of a category associated to an item in an alternative association. The effective date range indicates the duration for which the items in a category will be considered as alternative items.

You can modify the effective date range of a category for an alternative association from the Item Associations screen.

To modify the effective date range of a category for an alternative association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Alternative**. The Item Associations screen is displayed. The **Alternate Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Alternate Associations** panel, click the **Category** tab.
7. In the **Category** area that is displayed, select the check box adjacent the category whose details you want to modify, and click **Modify**.
8. The Modify Association Category dialog box is displayed. Perform the following steps:
 - Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - Click **Save** to save the details, and close the dialog box.
9. Click **Save**.

Note: * indicates that the field is mandatory.

The effective date range of a category for an alternative association is modified.

Dissociate a Category from an Item for an Alternative Association

You can dissociate a category from an item if you do not want to associate all the items in the category to the item for an alternative association.

To dissociate a category from an item for an alternative association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Alternative**. The Items Associations screen is displayed. The **Alternate Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Alternate Associations** panel, click the **Category** tab.
7. In the **Category** area that is displayed, select the category that you want to dissociate from the item.
8. Click **Remove**.
9. A message asking you for confirmation is displayed. Click **Yes** to dissociate the category. The selected category is disassociated from the item.

Associate a Competitive Item to an Item

A competitive association allows you to associate two competing brands of an item. For example, an enterprise may sell a computer of brand Y and a computer of brand X. You can associate these two items together so that a customer can compare the brands when viewing the computers.


You can associate a competitive item to an item from the Item Associations screen.

To associate the competitive item to an item:



1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Competitive**.

The Items Associations screen is displayed. The **Competitive Associations** panel displays the following read-only text boxes:

- Short Description
- Item Characteristic
- Status

6. In the **Items** area that is displayed, click **Add**.
7. The Add Association Item dialog box is displayed. Perform the following steps:
 - a. In the **Item ID*** box, click  to search for an Item ID. The Basic Item Search dialog box is displayed. Enter the search criteria, and click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed. In the search results list that is displayed, select the item that you want to associate as an alternative item, and click **Select**.

Note: A bundle item cannot be associated to any other item.

 - b. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.
 - c. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
 - d. In the **Associated Quantity*** text box, enter the quantity of the associated item that is relevant to this association.
 - e. In the **Priority** field, enter the priority of the associated item. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.

f. Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The competitive item is associated to the item.

Modify the Competitive Item's Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify a competitive item's details from the Item Associations screen.

To modify a competitive item's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Items**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Competitive**.

The Items Associations screen is displayed. The **Competitive Associations** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the check box adjacent the item whose details you want to modify, and click **Modify**.
 7. The Modify Association Item dialog box is displayed. Perform the following modifications:
 - Select a new **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the association becomes active.
 - Select a new **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the association remains active.
 - In the **Associated Quantity*** text box, enter a new quantity for the associated item that is relevant to this association.
 - In the **Priority** field, enter a new priority for the associated item. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The competitive item's details are modified.

Dissociate a Competitive Item from an Item

To dissociate a competitive item from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Competitive**.
The Items Associations screen is displayed. The **Competitive Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Items** area that is displayed, select the item that you want to disassociate from an item.
7. Click **Remove**.
8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the item.
The selected item is dissociated from the item.

Associate a Category to an Item for a Competitive Association

You can assign a category to an item so that all the items in the assigned category are associated to the existing item as competitive items.




You can associate a category to an item for a competitive association from the Item Associations screen.

To associate a category to an item for a competitive association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Competitive**.

The Items Associations screen is displayed. The **Competitive Associations** panel displays the following read-only text boxes:

- Short Description
- Item Characteristic
- Status

6. Click the **Category** tab.
7. In the **Category** area that is displayed, click **Add**.
8. The Add Association Category dialog box is displayed. Perform the following steps:
 - a. In the **Category ID*** box, click  to select the category. The **Tree** panel is displayed. Select the category that you want to associate, and click **Select**.
 - b. Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - c. Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - d. Click **Save** to save the details, and close the dialog box.
9. Click **Save**.

Note: * indicates that the field is mandatory.



The category is associated to the item for a competitive association.

Modify the Effective Date Range of a Category for a Competitive Association

You can modify the effective date range of a category associated to an item in a competitive association. The effective date range indicates the duration for which the items in a category will be considered as competitive items.

You can modify the effective date range of a category for a competitive association from the Item Associations screen.

To modify the effective date range of a category for a competitive association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Competitive**.
The Item Associations screen is displayed. The **Competitive Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. In the **Competitive Associations** panel, click the **Category** tab.
7. In the **Category** area that is displayed, select the check box adjacent the category whose details you want to modify, and click **Modify**.
8. The Modify Association Category dialog box is displayed. Perform the following steps:
 - Select an **Effective Start Date*** Click , and select a date. The effective start date is the date from which the association is active.
 - Select an **Effective End Date*** Click , and select a date. The effective end date is the date until which the association remains active.
 - Click **Save** to save the details, and close the dialog box.
9. Click **Save**.

Note: * indicates that the field is mandatory.

The effective date range of a category for a competitive association is modified.

Dissociate a Category from an Item for a Competitive Association

You can dissociate a category from an item if you do not want to associate all the items in the category to the item for a competitive association.

To dissociate a category from an item for a competitive association:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Competitive**. The Items Associations screen is displayed. The **Competitive Associations** panel displays the following read-only text boxes:
 - Short Description
 - Item Characteristic
 - Status
6. Click the **Category** tab.
7. In the **Category** area that is displayed, select the category that you want to dissociate from the item.
8. Click **Remove**.
9. A message asking you for confirmation is displayed. Click **Yes** to dissociate the category. The selected category is disassociated from the item.

Add an Asset to an Item

Assets are electronic media objects that you associate with items, categories, attributes, and attribute values. Asset types include images, video, audio, and text files.

You must specify the content location for each of the assets. Typically, assets are digitally-based objects that reside on external systems. For example, you can assign an image file to a category that is available from an online catalog so that online customers can view an image that represents this category. In such a scenario, you must provide a content location for the image file. Content location is the path that identifies the location of the image file.

You can add an asset to an item from the Assets screen.

To add an asset to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Assets**.
6. In the **Assets** panel that is displayed, click **Add**.
7. The Asset Detail dialog box is displayed. Perform the following steps:
 - a. In the **Asset ID*** box, enter a unique identifier (ID) for the asset.
 - b. In the **Short Description*** box, enter a brief description of the asset.
 - c. In the **Long Description** box, enter a detailed description of the asset.
 - d. From the **Server** drop-down list, select the server on which this asset type is located. The drop-down list is either populated by all the available server locations, or the codes that are configured in the Applications Manager.
 - e. From the **Type** drop-down list, select the asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - f. In the **File** box, enter the name of the file.
 - g. Click **Save**.

Note: * indicates that the field is mandatory.

The asset is added to the item.

Modify Asset Details

You can choose to modify the short description and description of an asset. You can also modify the location of the server, asset type, and the name of the file in which the asset is created.

To modify asset details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Assets**.
6. In the **Assets** panel that is displayed, select the asset row that you want to modify.
7. The **Asset Detail** area is displayed. Make the necessary modifications:
 - In the **Short Description*** box, enter a new brief description of the asset.
 - In the **Long Description** box, enter a new detailed description of the asset.
 - From the **Server** drop-down list, select a new server on which this asset type is located.
 - From the **Type** drop-down list, select a new asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - In the **File** box, enter a new name of the file.
 - Click **Save**.

Note: The **Asset ID** text box is displayed as read-only.

The asset details are modified.

Delete an Asset from an Item

You can delete an asset from an item if you do not want any of the electronic media objects to be associated with an item.

To delete an asset from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Assets**.
6. In the **Assets** panel that is displayed, select the asset row you want to delete.
7. Click **Delete**.
8. A message asking for confirmation is displayed. Click **Yes** to delete the selected asset from the list.
The selected asset is deleted from the item.

Associate a Keyword to an Item

Keywords are the words that you want to associate to an item. These keywords can be used by a customer as a search criteria when searching for an item. For example, keywords for the item LCD TV are Flat screen, LCD TV, Television, TV, and so on.

You can associate a keyword to an item from the Aliases and Keywords screen.

To associate a keyword to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Keywords** area, enter the keywords for the item. You can enter multiple keywords by separating each word with a comma.
 7. Click **Save**.

The keywords are associated to the item.

Dissociate a Keyword from an Item

You can dissociate a keyword from an item if you do not want the keyword to act as an alternative identifier for the item. If you have associated multiple keywords to an item, you can dissociate specific keywords and retain the required keywords.

To dissociate a keyword from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Keywords** area, delete the existing keywords.
 7. Click **Save**.

The keywords are dissociated from the item.

Associate an Alias to an Item

An alias acts as an alternate identifier for an item. You can configure one or more alias for an item. Examples for aliases include, SKU (Stock Keeping Unit), Alternate Item Id, UPC (Universal Product Code), EAN (European Article Number), and so on.

You can associate an alias to an item from the Aliases and Keywords screen.

To associate an alias to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Aliases** area, enter value for the configured alias types.
 7. Click **Save**.

The alias is associated to the item.

Dissociate an Alias from an Item

You can dissociate an alias from an item if you do not want an alternate identifier for an item.

To dissociate an alias from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Aliases** area, delete value of the existing alias types.
 7. Click **Save**.

The alias is dissociated from the item.

Associate an Exclusion Code to an Item

You can assign an exclusion code to an item if your business practices involve the regulation of item shipments for certain countries. For example, if there are certain countries that you ship-to that do not allow the shipment of certain hazardous materials, you can assign an exclusion code to the items that may contain the hazardous material.



By default, Sterling Selling and Fulfillment Foundation does not provide logic to handle item exclusion codes. This functionality is provided to enable the integration of Sterling Selling and Fulfillment Foundation with external systems that can handle item exclusion codes.

You can associate an exclusion code to an item from the Aliases and Keywords screen.

To associate an exclusion code to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Exclusion Codes** area is displayed. From the **Available Codes** list, select the exclusion code that you want to associate to the item.
 7. Click  to include the exclusion code in the **Subscribed Codes** list. To associate all the available codes to the **Subscribed Codes** list, click .
 8. Click **Save**.

The exclusion code is associated to the item.



Dissociate an Exclusion Code from an Item

You can dissociate an exclusion code from an item if your business practices do not involve the regulation of item shipments for certain countries.

To dissociate an exclusion code from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Exclusion Codes** area is displayed. From the **Subscribed Codes** list, select the exclusion code that you want to dissociate from the item.
 7. Click  to include the exclusion code in the **Available Codes** list. To dissociate all the subscribed codes to the **Available Codes** list, click .
 8. Click **Save**.

The exclusion code is dissociated from the item.

Define the Merchandising and Sales Details of an Item

For an item, you can provide additional information that can be viewed by the customer when the customer places an order. This additional information can also be used by the sales force when selling the item. For example, you may add an image for each of the locales the product is going to be sold in.

You can manage the merchandise and sales details for an item from the Marketing and Sales Fields screen.

To define merchandise and sales details for an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Sales Information**.

In the **Extended Description** box, enter a detailed description about the item. The details screen is displayed, with the following read-only text boxes:

- Short Description
- Item Characteristic
- Status

In the **Merchandising and Sales Fields** panel, perform the following steps:

- a. From the **Item Image Server** drop-down list, select the location of the server where the item image is located.
- b. In the **Item Image File** box, enter the name of the image file that is to be used as the item image. Ensure that the file name you enter is exactly the same as available in the server.
- c. In the **Item Image Description** box, enter the description of the item image.

Notes:

- An image of the item is displayed adjacent the **Item Main Image** field.
- The **Assigned to categories** field is displayed only if the item is assigned to at least one category. Value of this field indicates the path to the corresponding categories in a catalog to which the item is assigned.

6. In the **Sales fields** panel, perform the following steps:
 - a. From the **Cost Currency** drop-down list, select a currency, such as Euro or Dollar, which the cost of the item is determined.
 - b. In the **Minimum Order Quantity** text box, enter the minimum quantity of the item for which an order can be created. An order will not be created if a customer enters a quantity less than the entered minimum order quantity.


- c. In the **Unit Cost** box, enter the cost of the item. All cycle counts are based on the unit cost of the item.
- d. In the **Maximum Order Quantity** box, enter the maximum quantity of the item for which an order can be created. Ensure that the maximum order quantity is greater than the minimum order quantity. An order will not be created if a customer enters a quantity more than the entered maximum order quantity.
- e. In the **Computed Cost Box**, enter the computed cost of the item.
- f. From the **Eligible for shipping discount** drop-down list, select **Yes** if the item is eligible for a shipping discount.
- g. From the **Gift Wrapping Available** drop-down list, select **Yes** if gift wrapping is available for the item.
- h. From the **Bundle Pricing Strategy** drop-down list, select one of the following options:
 - **Only include components**: Select this to calculate the cost of a bundle item based only on the bundle components.
 - **Only include parent**: Select this to calculate the cost of a bundle item based only on the bundle parent item.
 - **Include both parent and components**: Select this to calculate the cost of a bundle item based on both the bundle parent item and its components.
- i. Select the **Taxable** check box, if the item is taxable.
- j. Select the **Must be sold as a component in a bundle or kit** check box if the item must not be sold as an individual component, and can only be sold as a component in either a bundle item or a physical kit item.
- k. Select the **Can be added to work order as service tool** check box to allow the item to be used as a service tool on a work order. A service tool can still serve as a regular product item whose inventory can be adjusted and tracked within Sterling Selling and Fulfillment Foundation. Additionally, it can be associated with a work order as a tool that may be used by a resource to complete the work order's services.


Note: The **Bundle Pricing Strategy** drop-down list is displayed only for bundle items. If you have created a bundle item as a configurable item in the Components screen, ensure that you select only the **Include both parent and components** option from the **Bundle Pricing Strategy** drop-down list. If the configurable bundle item is created as a preconfigured item, ensure that you select only the **Only include parent** option from the **Bundle Pricing Strategy** drop-down list.

- 7. In the **Kit fields** panel, from the **Cost Factor Group to be Used for calculations** drop-down list select the cost factor group that you want applied for the work-in-progress cost computations. This list contains the cost factor groups defined by the catalog organization's Primary Enterprise.

Note:The **Cost Factor Group to be Used for calculations is applicable only** if you are using the Sterling Selling and Fulfillment Foundation Solution inventory costing feature, and you have identified the item as a Physical Kit type.

- 8. Click **Save**.

Note: If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short

Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).

The merchandising and sales details of the item are defined.

Add a Node and Define the Node Details of an Item

You can add a node to an item, and then define the node-specific details for the item. The details you assign at the node level override any of the associated attributes that may have been defined for an item when an order containing that item is released to the node.

You can add a node and define the node details of an item from the Item Nodes screen.

To add a node and define the node details of an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Task** panel, click **Manage Node Information** under the **Fulfillment Information** area.

The Item Nodes screen is displayed, with the following read-only text boxes:

- Short Description
- Item Characteristic
- Status

6. In the **Item Nodes** panel that is displayed, click **Add**.
7. The Basic Node Search dialog box is displayed. Perform the following steps:
 - a. Enter the search criteria, click **Search**.
 - b. From the **Nodes** panel that is displayed, select a node. The node list displays all the available Ship Nodes.
 - c. Click **Save**.

The node is displayed in the **Nodes** panel.

8. In the **Nodes** panel, select the check box adjacent the node whose details you want to define.
9. The **Details** panel is displayed. Perform the following steps:
 - a. In the **Storage Type** box, enter the storage type for the item. The storage type indicates any special attributes of the item that may require it to be stored at a certain location or in a particular manner in a warehouse. For example, perishable items must be stored only in cold storage.
 - b. In the **Picking Type** box, enter the type of picking value for the item. The picking type indicates
 - c. In the **Velocity Code** box, enter the velocity code value for the item. The velocity code indicates the item's turnover rate in a warehouse.

- d. Select the **Operational Configuration Complete** check box if the operational configuration of a specific node is complete.

Note: The **Node** field is displayed as read-only.

10. In the Item Nodes screen, click **Save**.

The node is added, and the node details are also defined.

Modify Node Details

You can choose to modify the node details that override any of the associated attributes that may have been defined for an item when an order containing that item is released to the node.

To modify node details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Task** panel, click **Manage Node Information** under the **Fulfillment Information** area.

The Item Nodes screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Nodes** panel that is displayed, select the check box adjacent the node whose details you want to modify.
 7. The **Details** panel is displayed. Make the following modifications:
 - In the **Storage Type** box, enter a new storage type for the item. The storage type indicates any special attributes of the item that may require it to be stored at a certain location or in a particular manner in a warehouse. For example, perishable items must be stored only in cold storage.
 - In the **Picking Type** box, enter a new type of picking value for the item. The picking type indicates
 - In the **Velocity Code** box, enter a new velocity code value for the item. The velocity code indicates the item's turnover rate in a warehouse.
 - Select the **Operational Configuration Complete** check box if the operational configuration of a specific node is complete.

Note: The **Node** field is displayed as read-only.

8. In the Item Nodes screen, click **Save**.

The node details are modified.

Remove a Node from an Item

To remove a node from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Task** panel, click **Manage Node Information** under the **Fulfillment Information** area.

The Item Nodes screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Nodes** panel that is displayed, select the check box adjacent the node row that you want to remove.
 7. Click **Delete**.
 8. A message asking you for confirmation is displayed. Click **Yes**.

The selected node is removed from the item.

Define an Item Classification

You can use item classifications for tasks such as sourcing, associating services, determining shipping preferences, and so on. By defining an item classification, you can identify an item attribute as having a specified use in Sterling Selling and Fulfillment Foundation.


You can define all the classification details for an item from the Item Classifications screen. If an item attribute (fields that are displayed in this screen) is associated to a classification, you can select a classification value for that field. If an item attribute is not associated to the classification, you can manually enter the value for that field.

Note: For all the child items of a Variation item, the Item Classifications screen is displayed as a read-only screen because the values defined in a classification for a variation item are inherited by all the child items of the variation item.

To define an item classification:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Classification Values**.

The details screen is displayed, with the following read-only text boxes:


- Short Description
 - Item Characteristic
 - Status
6. In the **Standard Classification** area, for all the item fields you can:
 - Click  to view the list of available classification values, and select a value for the field. This option is available only if the item field is associated to the classification to which the item belongs.
 - Enter the appropriate values for the fields.

The following table lists the fields displayed in the **Standard Classification** area:

Field	Description
Harmonized Code	The item's harmonized code.
Commodity Code	The item's commodity code.
ECCN Number	The item's Export Commodity Control Number.

Field	Description
UNSPSC	The item's United Nations Standard Product and Services Code.
Tax Product Class	The item's tax product class.
Model	The item's model number.
Cost Posting Classification	The item's cost posting classification.
Schedule Code	The item's Schedule B Code.
NMFC Code	The item's National Motor Freight Code.
NMFC Class	The item's National Motor Freight Code Class.
NAICS Code	The item's North American Industry Classification System code.
Hazardous Material Class	The item's hazardous material class.
Is Hazardous Item	Indicates if the item belongs to the hazardous material class.


7. In the **Organization Classifications** area, for all the fields you can:

- Click  to view the list of available classification values, and select a value for the field. This option is available only if the item field is associated to the classification to which the item belongs.
- Enter the appropriate values for the fields.

The following table lists the fields displayed in the **Organizational Classification** area:

Field	Description
Product Line	The item's product line defined according to your business practices.
Item Type	The item's type defined as per your business practices.

8. In the fields in **Operational Classifications** area, you can:

- Click  to view the list of available classification values, and select a value for the field. This option is available only if the item field is associated to the classification to which the item belongs.
- Enter the appropriate values for the fields.

The following table lists the fields displayed in the **Operational Classification** area:

Field	Description
Storage Type	The item's storage type. The storage code indicates any special attributes of the item that may require it to be stored at a certain location in a warehouse.
Picking Type	The item's picking type.
Velocity Code	The item's velocity code. The velocity code indicates the item's turn over rate in a warehouse.

9. In the **Operational Classification** area, select the **Operational Configuration Complete** check box, after completing the operational configuration for the item.
10. In the Item Classifications screen, click **Save**.
The item's classification is defined.

Create a Delivery Service

A delivery service is used for the last mile delivery associations. The last mile delivery differs from the order shipping because specific product item deliveries are made using a carrier with a defined capacity constraint. For example, you might want to associate a delivery service with Projection TVs and washing machines.

A delivery item is uniquely defined by its item ID and unit of measure. Typically, you can use delivery services for product items that are:

- Heavy, oversized, or fragile, and cannot be transported by common carriers
- Require special handling such as special equipment and/or personnel

You can create a delivery service from the Create Service screen.

To create a delivery service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **New Service**. Alternatively, you can also click the **New Service** hyperlink in the homepage.
3. In the Create Service screen that is displayed, perform the following steps:
 - a. In the **Select the type of service to be created** area, select the **Delivery** radio button.
 - b. In the **Service ID*** text box, enter the unique service identifier.
 - c. From the **UOM** list, select the unit of measure for the service.
 - d. From the **Service Type*** drop-down list, select the service type.
Depending on the **Service Type*** you have selected, the **Capacity UOM** text box is populated with the capacity unit of measure that is associated with the selected service type.
 - e. Click **Save**.

Note: * indicates that the field is mandatory.

The service is created and the Primary Information screen is displayed.

Define Primary Information for a Delivery Service

After you have created a service, you can now define the details for the newly created service. Also, if you have already defined the service details, you can modify the service details.

You can define the primary information for a service from the Primary Information screen.

To define primary information for a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the Services panel that is displayed, click the **Service ID** hyperlink.

The Primary Information screen is displayed with the following read-only boxes:

- Short Description
 - Service Characteristic
 - Status
5. From the **Service Status** drop-down list, select the status of the service. Select one of the following:
 - **Held (Unpublished)**: select to make the item unavailable. Such items are not processed by the Sterling Selling and Fulfillment Foundation APIs.
 - **Published**: select to make the item available to the Sterling Selling and Fulfillment Foundation APIs.
 6. In the **Short Description*** text box, enter the brief description of the service. This description is displayed when the list of items are displayed in a table. For example, in the Search Results screen.
 7. In the **Long Description** text box, enter the detailed description of the service. This description is displayed at wherever the service details are displayed. For example, in the Service Details screen.
 8. The **Primary Fields** area is read-only. It displays the following:
 - **Service Type**
 - **Capacity UOM**
 9. In the **Service Quantity** area, select the radio button corresponding to any of the following service quantities:
 - **specified manually on the line**: select to manually specify the ordered quantity on the order line.
 - **copied from the associated product line's quantity**: select to specify one ordered quantity of a service item for each ordered quantity of a product item.
 10. In the **Capacity Consumption** area, perform the following:
 - a. In **A fixed capacity of <Number of units> Unit will be consumed for each quantity on the line**, enter the number of fixed hour or hours that is required to complete one quantity of the item in the

order line. For example, for a home delivery service, if the time required to deliver one quantity of a Television is 2 hours, then you must enter 2 as the number of hours.

b. Define an additional capacity by selecting any one of the following:

• **in the associated product's configuration:** select to specify the additional variable capacity based on the associated product line quantity.



• **in this service:** select to specify the additional variable capacity based on the ordered quantity.

c. In **An additional capacity of <Number of units> Unit will be consumed for each quantity on the line**, enter the number of additional unit or units consumed for each quantity of the line.

Note: This option is enabled only if you select the **In this service** option when defining the additional capacity.

11. Click **Save** in the Primary Information screen.

Notes:

- If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).
- * indicates that the field is mandatory.

The primary information for the delivery service is defined. You can now perform the related tasks such as managing instructions, managing associations, and so on.

Create a Provided Service

A provided service is any additional action that can be provided to an order that does not represent a physical item. For example, you may sell a washing machine that you want to provide installation for. In this scenario, you can create the installation service as a provided service, which can be offered when a customer orders the washing machine.

A provided service item is uniquely defined by its service ID and unit of measure.

Note: A provided service does not always have to be associated with an item. You can configure a provided service to be sold by itself as a stand alone service.

You can create a provided service from the Create Service screen.

To create a provided service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **New Service**. Alternatively, you can also click the **New Service** hyperlink in the homepage.
3. In the Create Service screen that is displayed, perform the following steps:
 - a. In the **Select the type of service to be created** area, select the **Provided** radio button.
 - b. In the **Service ID*** text box, enter the unique service identifier.
 - c. From the **UOM** list, select the unit of measure for the service.
 - d. From the **Service Type*** drop-down list, select the service type.
Depending on the **Service Type*** you have selected, the **Capacity UOM** text box is populated with the capacity unit of measure that is associated with the selected service type.
 - e. Click **Save**.

Note: * indicates that the field is mandatory.

The service is created and the Primary Information screen is displayed.

Define Primary Information for a Provided Service

After you have created a service, you can now define the details for the newly created service. Also, if you have already defined the service details, you can modify the service details.

You can define the primary information for a service from the Primary Information screen.

To define primary information for a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the Services panel that is displayed, click the **Service ID** hyperlink.



The Primary Information screen is displayed with the following read-only boxes:

- Short Description
 - Service Characteristic
5. From the **Service Status** drop-down list, select the status of the service. Select one of the following:
 - **Held (Unpublished)**: select to make the item unavailable. Such items are not processed by the Sterling Selling and Fulfillment Foundation APIs.
 - **Published**: select to make the item available to the Sterling Selling and Fulfillment Foundation APIs.
 6. In the **Short Description*** text box, enter the brief description of the service. This description is displayed when the list of items are displayed in a table. For example, in the Search Results screen.
 7. In the **Long Description** text box, enter the detailed description of the service. This description is displayed at wherever the service details are displayed. For example, in the Service Details screen.
 8. In the **Primary Fields** area, perform the following:
 - a. Select the **Association with product is required** check box to require that the provided service must be sold along with one of its associated product items. Clear this check box to allow the provided service to be sold by itself as a stand alone service.
 - b. Select the **Is Return Service** check box to allow the provided service to be added to return orders.
The following are read-only: **Service Type** and **Capacity UOM**
 9. In the **Service Quantity** area, select the radio button corresponding to any of the following service quantities:
 - **specified manually on the line**: select to specify the ordered quantity manually on the order line.
 - **copied from the associated product line's quantity**: select to specify one ordered quantity of a service item for each ordered quantity of a product item.

10. In the **Capacity Consumption** area, perform the following:
 - a. In **A fixed capacity of <Number of hours> Hour will be consumed for each quantity of the line**, enter the number of fixed hour or hours that is required to complete one quantity of the item in the order line. For example, for a installation provided service, if the time required to install one quantity of a Television is 4 hours, then you must enter 4 as the number of hours.
 - b. In **The node fulfilling this service needs to be notified <Number of hours> hour(s) in advance**, enter the number of hour or hours that has to be specified in advance to the node fulfilling this service.
 - c. Define an additional capacity by selecting any one of the following:
 - **in the associated product's configuration**: select to specify the additional variable capacity based on the associated product line quantity.
 - **in this service**: select to specify the additional variable capacity based on the ordered quantity.
 - d. In **An additional fixed capacity of <Number of hours> Hour will be consumed for each quantity of the line**, enter the number of additional hour or hours that is consumed for each quantity of the line.

Note: This option is enabled only if you select the **In this service** option when defining the additional capacity.
11. Click **Save** in the Primary Information screen.

Notes:

- If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).
- * indicates that the field is mandatory.

The primary information for the provided service is defined. You can now perform the related tasks such as managing instructions, managing associations, and so on.

Create a Return Pickup Service

A return pickup service is used to define a pickup service from a customer, in case the customer wants to return an item. A return pickup item is uniquely defined by its service ID and unit of measure.

You can create a return pickup service from the Create Service screen.

To create a return pickup service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **New Service**. Alternatively, you can also click the **New Service** hyperlink in the homepage.
3. In the Create Service screen that is displayed, perform the following steps:
 - a. In the **Select the type of service to be created** area, select the **Return Pickup** radio button.
 - b. In the **Service ID*** text box, enter the unique service identifier.
 - c. From the **UOM** list, select the unit of measure for the service.
 - d. From the **Service Type*** drop-down list, select the service type.
Depending on the **Service Type*** you have selected, the **Capacity UOM** text box is populated with the capacity unit of measure that is associated with the selected service type.
 - e. Click **Save**.

Note: * indicates that the field is mandatory.

The service is created and the Primary Information screen is displayed.

Define Primary Information for a Return Pickup Service

After you have created a service, you can now define the details for the newly created service. Also, if you have already defined the service details, you can modify the service details.

You can define the primary information for a service from the Primary Information screen.

To define primary information for a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the Services panel that is displayed, click the **Service ID** hyperlink.



The Primary Information screen is displayed with the following read-only boxes:

- Short Description
 - Service Characteristic
 - UOM
5. From the **Service Status** drop-down list, select the status of the service. Select one of the following:
 - **Held (Unpublished)**: select to make the item unavailable. Such items are not processed by the Sterling Selling and Fulfillment Foundation APIs.
 - **Published**: select to make the item available to the Sterling Selling and Fulfillment Foundation APIs.
 6. In the **Short Description*** text box, enter the brief description of the service. This description is displayed when the list of items are displayed in a table. For example, in the Search Results screen.
 7. In the **Long Description** text box, enter the detailed description of the service. This description is displayed at wherever the service details are displayed. For example, in the Service Details screen.
 8. The **Primary Fields** area is read-only. It displays the following:
 - **Service Type**
 - **Capacity UOM**
 9. In the **Service Quantity is** area, select the radio button corresponding to any of the following service quantities:
 - **specified manually on the line**: select to manually specify the ordered quantity on the order line.
 - **copied from the associated product line's quantity**: select to specify one ordered quantity of a service item for each ordered quantity of a product item.

10. In the **Capacity Consumption** area, perform the following:
 - a. In **A fixed capacity of <Number of units> Unit will be consumed for each quantity on the line**, enter the number of fixed unit or units that is consumed for each quantity of the line.
 - b. Define an additional capacity by selecting any one of the following:
 - in the associated product's configuration**: select to specify the additional variable capacity based on the associated product line quantity.
 - in this service**: select to specify the additional variable capacity based on the ordered quantity.
 - c. In **An additional capacity of <Number of units> Unit will be consumed for each quantity on the line**, enter the number of additional unit or units consumed for each quantity of the line.

Note: This option is enabled only if you select the **In this service** option when defining the additional capacity.
11. Click **Save** in the Primary Information screen.

Notes:

- If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).
- * indicates that the field is mandatory.

The primary information for the return pickup service is defined. You can now perform the related tasks such as managing instructions, managing associations, and so on.

Create a Value-Added Service

Value-added services are services that customize a product for a buyer, or allow for internal inventory management. This can be because of a buyer's special requirements, such as creating a customized order, or performing special processes for the buyer at the warehouse, or providing additional services to the customer, such as installing a light fixture.

You can create a value-added service from the Create Service screen.

You can create the following types of value-added services:

- **Kitting Service:** describes the process of assembling the components of an item.
- **DeKitting Service:** describes the process of disassembling an item. This is used to acquire an item component to complete another order.
- **Compliance Service:** describes the value-added services that must be performed to supply an item to a specific buyer. This service is used for made-to-customer orders.
- **Inventory Change Service:** describes how to convert inventory from one UOM to another UOM.

To create a value-added service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **New Service**. Alternatively, you can also click the **New Service** hyperlink in the homepage.
3. In the Create Service screen that is displayed, perform the following steps:
 - a. From the **Value-Added Service** area, select any one of the radio buttons.
Note: The Service Type, UOM list, Capacity UOM are read-only for a Value-Added Service.
 - b. In the **Service ID*** text box, enter the unique service identifier.
 - c. Click **Save**.

Note: * indicates that the field is mandatory.

The Primary Information screen is displayed.

Define Primary Information for a Value-Added Service

After you have created a service, you can now define the details for the newly created service. Also, if you have already defined the service details, you can modify the service details.

To define primary information for a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Service Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink.

The Primary Information screen is displayed with the following read-only boxes:

- Short Description
 - Service Characteristic
5. From the **Service Status** drop-down list, select the status of the service. Select one of the following:
 - **Held (Unpublished)**: select to make the item unavailable. Such items are not processed by the Sterling Selling and Fulfillment Foundation APIs.
 - **Published**: select to make the item available to the Sterling Selling and Fulfillment Foundation APIs.
 6. In the **Short Description*** text box, enter the brief description of the service. This description is displayed when the list of items are displayed in a table. For example, in the Search Results screen.
 7. In the **Long Description** text box, enter the detailed description of the service. This description is displayed at wherever the service details are displayed. For example, in the Service Details screen.
 8. In the **Extended Description** box, enter a more detailed description of the service.
 9. Enter the **Run Quantity**. This text box is displayed **only** if you have created a **Kitting** type of value-added service.

A run quantity is used to calculate the number of items that must be created when there is insufficient inventory to meet an order for the item. In other words, this indicates the number of items when a compliance service is run. By grouping the production of an item that has compliance services applied to it, inventory can be created in anticipation of the buyer's requirements.

The run quantity is a number that indicates how many items to batch together the actual request for product and the available inventory to determine how many items must have the compliance service applied.

For example, if the run quantity is 10, and a buyer requests 8 of the item, but there is only 1 on hand, 10 items have the compliance services applied. The result is that the buyer receives 8 items, 1 from the

current inventory, 7 that are newly created, and 3 newly created items that are now available in the inventory.

If a buyer requires more than what the run quantity has, the run quantity is used to create several runs. For example, if a buyer were to request 22 items, and only 1 item is in stock, doing a run of 10 would not meet the request. Doing two runs of 10 each would also not satisfy the request, but doing 3 runs would satisfy the request. Therefore, a single run of 30 is done.

The run quantity must be set based on the anticipated buyer requirements. For example, for bulky items such as refrigerators or washing machines, the number might be low. For items that the buyer purchases in large quantities, such as T-shirts embroidered with a sports team logo, the number might be higher.

10. Based on your requirement, select or clear the **Create work order while scheduling an order requiring this service** check box. This is available **only** if you have created a **Compliance** type of value-added service.

Select this option to automatically generate a work order as necessary when scheduling an order. This is typically used when the scheduling process has to consider setting aside items that are to be supplied as part of the order, or when there is a need for allocating time to perform the compliance service.



When processing of a schedule is performed, the processing may detect the need to create more items in order to meet the requirements of an order. This option lets you control whether a work order must be generated, based on your procedures.

For example, you may have a compliance service that includes adding a warranty card to each of the telephones shipped. Because of the way telephones are packed, this can be done as part of the packing process, and no separate work order is required. Also, there is no need to separately reserve telephones for this particular order because they do not require any other special handling, and can be used to supply other order demands. In such a situation, you must clear the **Create work order while scheduling an order requiring this service** check box.

Let us assume that in a different scenario, a buyer's corporate label is applied to the telephones that are shipped. In order to schedule the order, a work order is generated to track the process, and inventory is allocated to create customized telephones. These customized telephones cannot be used supplied as part of another buyer's order. In this scenario, you must select the **Create work order while scheduling an order requiring this service** check box to automatically generate the work order and to allocate stock to fulfill the compliance service task.

11. Click **Save** in the Primary Information screen.

Notes:

- If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).

- * indicates that the field is mandatory.

The primary information for the value-added service is defined. You can now perform the related tasks such as managing instructions, managing associations, and so on.

Search for a Service

You can search for a service and view its details using the following options:

- **Basic Service Search:** This type of search enables you to perform a quick search by specifying basic criteria such as the complete or partial identifier of the service, or the complete or partial description of the service.
- **Advanced Search:** This type of search enables you to perform a search based on the criteria that is selected. You can select the criteria and the corresponding operator, and then select or specify the corresponding values.

You can search for a service from the Service Search screen.

Basic Service Search

To perform a basic service search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. The Service Search screen is displayed. In the **Service ID Contains** text box, enter the complete or partial identifier of the service you want to search for.
4. In the **Service Description Contains** text box, enter the complete or partial description of the service you want to search for.
5. From the **Service Characteristic** drop-down list, select the service characteristic of the service you want to search for.
6. Click **Search**.

The services matching the search criteria are displayed. However, if there is only one service matching the search criteria, the Primary Information screen is displayed.

Note: If the administration organization is not a service organization, the services that are available for the service organization of the administration organization are displayed.

Advanced Service Search

To perform an advanced service search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. The Service Search screen is displayed. Click **Advanced Search**.
4. The **Advanced Service Search** panel is displayed. From the **Select Criteria** drop-down list, select the criteria that you want to include in the search. For example, to search for a service by status, select **Status** from the **Select Criteria** drop-down list.

5. From the **Operator** drop-down list, select the operator you want to use for the search criteria.

In the corresponding field, enter or select the appropriate value for the criteria. The fields are displayed based on the operator you select. For example, if you select **Effective Start Date** from the **Select Criteria** drop-down list, and **Between** from the **Operator** drop-down list, two fields in which you can enter or select the appropriate dates, are displayed.

Note: It is mandatory that you select or enter at least one search criteria and a corresponding value. If you select or enter more than one search criteria, the search will return the services that match all the criteria.

6. Click **Search**.

The services matching the search criteria are displayed. However, if there is only one service matching the search criteria, the Primary Information screen is displayed.

Note: If the administration organization is not a service organization, the services that are available for the service organization of the administration organization are displayed.

Add More Search Criteria

You can include additional search criteria to perform a more detailed search and narrow down the search results.

To include additional search criteria:

1. In the Advanced Service Search screen, click **Add More Criteria**.
2. A new row for specifying the search criteria is displayed. Enter the appropriate search criteria, and click **Search**.

The services matching the search criteria are displayed. However, if there is only one service matching the search criteria, the Primary Information screen is displayed.

Note: If the administration organization is not a service organization, the services that are available for the service organization of the administration organization are displayed.

Save a Service Search

You can save a service search to avoid entering the search criteria every time you search for a particular service.

To save a service search:

1. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
2. The Service Search screen is displayed. Enter the appropriate search criteria. Alternatively, click **Advanced Service Search** and enter the appropriate search criteria.
3. From the **Saved Searches** drop-down menu, select **Create Saved Search**.
4. The Save Search dialog box is displayed. In the **Saved Search Name*** text box, enter a name for the search that is to be saved.
5. Select the **Include in favorite searches** check box to mark the saved search as a favorite. Marking a saved search as a favorite enables you to quickly navigate to that saved search from the home page. A

maximum of five most recent favorite saved searches are displayed as hyperlinks under the **Favorite Searches** panel in the home page. You can also access the favorite saved searches using the **Favorites** menu in the header bar of the home page.

6. Click **Save**.

The service search is saved. You can use the saved search when searching for the specific service.

Note: * indicates that the field is mandatory.

Perform a Search Using a Saved Service Search

To search for a service using a saved service search:

1. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
2. The Basic Service Search screen is displayed. Click **Saved Searches** to view the list of saved service searches. Alternatively, click **Advanced Search** and click **Saved Searches**.

The saved service searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

Note: A maximum of eight saved searches are displayed in the menu.

3. Perform either of the following tasks:

- If the saved search is displayed in the menu, click the saved search to view the corresponding search results.
- If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Services dialog box is displayed. In the **Saved Search Name Contains** field, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search results. Alternatively, click a saved search name and click **Select** to view the corresponding search results.

Note: The **More Searches...** button is displayed only if there are more than eight saved service searches.

The Service Search screen is displayed with the search criteria populated along with the search results.

Modify a Saved Service Search

To modify a saved service search:

1. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
2. The Basic Service Search screen is displayed. Click **Saved Searches** to view the list of saved service searches. Alternatively, click **Advanced Search** and click **Saved Searches**.

The saved service searches are displayed in a menu, with the favorite saved searches, if any, displayed at the top of the list.

Note: A maximum of eight saved searches are displayed in the menu.

3. Perform either of the following tasks:

- If the saved search is displayed in the menu, click the saved search to view the corresponding search screen.
 - If the saved search is not displayed in the menu, click **More Searches...** The Find Saved Searches for Services dialog box is displayed. In the **Saved Search Name Contains** field, enter either the complete or partial saved search name to filter the list of saved searches displayed in the **Saved Searches** panel. Double-click a saved search name to view the corresponding search screen. Alternatively, click a saved search name and click **Select** to view the corresponding search screen.
Note: The **More Searches...** button is displayed only if there are more than eight saved service searches.
4. The Service Search screen is displayed with the search criteria populated. Modify the appropriate information, and select **Create Saved Search** from the **Saved Searches** drop-down menu.
 5. The Save Search dialog box is displayed, with the name of the original saved search populated in the **Saved Search Name** field. Perform one of the following tasks:
 - To overwrite the original saved search, leave the name as is.
 - To save the search under a new name, enter a name for the search.
 6. Select the **Include in favorite searches** check box to include the saved search in the list of favorites. Marking a saved search as a favorite enables you to quickly navigate to that saved search from the home page. A maximum of five most recent favorite saved searches are displayed as hyperlinks under the **Favorite Searches** panel in the home page. You can also access the favorite saved searches using the **Favorites** menu in the header bar of the home page.
 7. Click **Save**.
The saved service search is modified.

Manually Add an Instruction to a Service

You can create a free-form text instruction when there are no preexisting service instruction codes or when you want to create a special instruction for a service

You can manually add an instruction to a service from the Service Instructions screen.

To manually add an instruction to a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Instructions**.

The Service Instructions screen is displayed. The **Service Instructions** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. From the **Manage instructions for type** drop-down list, select an instruction type to view all the instructions pertaining to the selected instruction type. The list displays all the configured service instruction types.
 7. In the **Instructions** panel of the Item Instructions screen, perform the following steps:
 - a. Click **Add**.
 - b. The New Instruction dialog box is displayed. In the **Details** area, select the **Enter text manually** radio button.
 - c. In the **Text** box, enter the instruction text.
 - d. Click **Save**.
 8. Click **Save** in the Service Instructions screen.

The instruction is manually added to the service.

Add an Instruction from Existing Instruction Codes to a Service

You can choose to use the predefined set of instruction codes for a service. For example, you may have a preexisting Handle With Care item instruction code that you can associate with fragile items.

You can add an instruction from existing instruction codes from the Service Instructions screen.

To add an instruction from existing instruction codes to a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Instructions**.
The Service Instructions screen is displayed. The **Service Instructions** panel displays the following read-only text boxes:
 - Short Description
 - Service Characteristic
 - Status
6. From the **Manage instructions for type** drop-down list, select an instruction type to view all the instructions pertaining to the selected instruction type. The list displays all the configured service instruction types.
7. In the **Instructions** panel of the Service Instructions screen, perform the following steps:
 - a. Click **Add**.
 - b. The New Instruction dialog box is displayed. In the **Details** area, select the **Use existing instruction code** radio button.
 - c. From the **Instruction Code** drop-down list, select the applicable instruction code.
 - d. Click **Save**.
8. Click **Save** in the Service Instructions screen.



The instruction from the existing instruction codes is added to the service.

Modify the Sequence of an Instruction for a Service

After all the instructions are created for a service, you can rearrange the sequence of the instructions. For example, from a set of instructions for a service you may want Make sure that the item is double bubble wrapped instruction to be the first instruction.

You can modify the sequence of an instruction form the Service Instructions screen.

To modify the sequence of an instruction for a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Instructions**. The Service Instructions screen is displayed. The **Service Instructions** panel displays the following read-only text boxes:
 - Short Description
 - Service Characteristic
 - Status
6. From the **Manage instructions for type** drop-down list, select an instruction type to view all the instructions pertaining to the selected instruction type. The list displays all the configured service instruction types.
7. In the **Instructions** panel of the Item Instructions screen, perform either of the following steps:
 - Select the check box adjacent the instruction, and click either  or  to modify the sequence of the instruction.
 - Select the entire row to drag-and-drop the instruction to the desired position.
8. Click **Save** in the Service Instructions screen.

The sequence of the instruction is modified.

Modify a Service's Instruction

You can choose to modify an instruction description, or the modify the instruction type from either manual text to a predefined set of instruction or from a predefined set of instruction to a manual text.

You can modify an instruction from the Service Instructions screen.

To modify a service's instruction:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
The Service Instructions screen is displayed. The **Service Instructions** panel displays the following read-only text boxes:
 - Short Description
 - Service Characteristic
 - Status
5. From the **Manage Instructions for type** drop-down list, select an instruction type to view all the instructions pertaining to the selected instruction type. The list displays all the configured service instruction types.
6. In the **Instructions** panel of the Service Instructions screen, perform the following steps:
 - a. Select the instruction row that you want to modify.
The **Details** area is populated with the details of the selected instruction.
 - b. In the **Details** area, make the necessary modifications.
7. Click **Save** in the Service Instructions screen.
The service's instruction is modified.

Delete an Instruction from a Service

You can delete instructions that were added manually and instructions that were added from the existing instruction codes. When you delete an instruction that was added manually to a service, the instruction is deleted from the database. However, when you delete an instruction that was added from the existing instruction codes, the instruction is not deleted from the database but only dissociated from the service.

To delete an instruction from a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Instructions**.
The Service Instructions screen is displayed. The **Service Instructions** panel displays the following read-only text boxes:
 - Short Description
 - Service Characteristic
 - Status
6. From the **Manage instructions for type** drop-down list, select an instruction type to view all the instructions pertaining to the selected instruction type. The list displays all the configured service instruction types.
7. In the **Instruction** panel of the Service Instructions screen, perform the following steps:
 - a. Select the instruction that you want to remove from the service.
 - b. The row is highlighted, and the **Details** panel is enabled. Click **Delete**.
 - c. A message asking for confirmation is displayed. Click **Yes** to delete the selected service from the list.
The instruction is deleted from the service.

Assign Values to the Extended Fields for a Service



You can specify the values for all the extended fields from the Extended Fields screen.

The extended fields displayed on the Extended Fields screen are populated from the YFS_ITEM table. All the columns from the extended YFS_ITEM table are displayed as fields on the Extended Fields screen.

To assign values to the extended fields for a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Extended Fields**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. Enter the values for the extended fields that are displayed. However, if the extended field is associated to a Classification Usage,  is displayed adjacent an extended field. Click . A dialog box with the classification values for the extended field is displayed. Perform the following steps:
 - a. Select a classification value from the tree.
 - b. Click **Select** to select the classification and close the dialog box.

The classification value is displayed in the boxes pertaining to extended fields.

7. Click **Save**.

The values to the extended fields are assigned for a service.

Associate a Provided Service to an Item

You can associate a provided service to an item to indicate a relationship between the service and the item. For example, you can assign Television installation as a provided service for the item, Television. For the associated provided service, you can define details such as the service quantity required for a specified quantity of the item, the skill sets required for the service, and so on.

You can associate a provided service to an item from the Provided Service Associations screen.


To associate a provided service to an item:


1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Provided Services**.

The Provided Service Associations screen is displayed. The **Item Service Associations** panel displays the following read-only boxes:

- Short Description
- Item Characteristic
- Status

6. In the **Services** panel, click **Add**.
7. The Basic Service Search dialog box is displayed. Enter the search criteria and click **Search**. Alternatively, you can use either the Basic Service Search or Advanced Search option to narrow down the list of services listed.
8. The Services panel with a list of services is displayed. Select a service, and click **Select**.
9. The details of the service is populated in the **Details** area. Perform the following steps:
 - a. In the **This service requires <number> of capacity to deliver <number of units> quantity**, enter the appropriate value for the capacity and the quantity. For example, if you had selected the unit of measure as hours when creating the service, enter the units for the capacity in hours, and the number of quantity units of the service.
 - b. Select the **Hold scheduling the service until the associated line has completed** check box if the provided service has a dependency on the item flow.
 - c. In **This service must be completed <number of unit of time>** enter the appropriate value to specify the offset duration, and **<select an option>** to specify when the service must be completed. The offset duration is the time required for the service to be completed before or after the delivery of the item. If the offset time is set before the delivery of the item, then the ServiceTimeOffset is set as a negative value, otherwise it is set as a positive value.
 - d. From the **Available Skills** list, select the skill that is to be associated to the service item.

e. Click  to move the selected skill to the **Associated Skills** list.

Tip: Click  to move all the available skills to the **Associated Skills** list.

10. Click **Save**.

The provided service is associated to the item.

Modify a Provided Service Associated to an Item

You can modify the details of the associated provided service such as the service quantity required for a specified quantity of the item, the skill sets required for the service, and so on.

To modify a provided service associated to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Provided Services**.

The Provided Service Associations screen is displayed. The **Item Service Associations** panel displays the following read-only boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the Services panel, select the service that you want to modify.
 7. You can modify the following for the selected service:
 - a. the number of units of the service
 - b. the number of item quantity
 - c. whether to hold the service scheduling till the associated line is completed or not
 - d. the offset duration
 - e. whether the service must be completed before or after delivery
 - f. service skill
 8. Click **Save** in the Item Details screen.

The provided service associated to the item is modified.

Dissociate a Provided Service from an Item

When you dissociate a provided service from an item, the associated service skills are also dissociated from the item.

You can dissociate a provided service from an item from the Provided Service Associations screen.

To dissociate a provided service from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Provided Services**.

The Provided Service Associations screen is displayed. The **Item Service Associations** panel displays the following read-only boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the **Services** panel, select the service you want to disassociate from the item.
 7. The **Details** area is enabled with the details of the selected service. Click **Remove**.
 8. A message asking you for confirmation is displayed. Click **Yes** to remove the service.
- The selected service and the associated service skills are removed from the database.

Associate a Delivery Service to an Item

You can associate a delivery service to an item to indicate a relationship between the service and the item. For example, you can assign Washing Machine delivery as a delivery service for an item Washing Machine. For the associated delivery service, you can define details such as the service quantity required for a specified quantity of the item, the skill sets required for the service, and so on.


You can associate a delivery service of an item from the Delivery Service Associations screen.

To associate a delivery service to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Delivery Services**.

The Delivery Service Associations screen is displayed, with the following read-only text boxes:

- Short Description
- Item Characteristic
- Status

6. In the **Services** panel, click **Add**.
7. The Basic Service Search dialog box is displayed. Enter the search criteria and click **Search**. Alternatively, you can use either the Basic Service Search or Advanced Search option to narrow down the list of services listed.
8. The Services panel with a list of services is displayed. Select a service, and click **Select**.
9. The details of the service is populated in the **Details** area. Perform the following steps:
 - a. In the **This service requires <number> of capacity to deliver <number of units> quantity**, enter the appropriate value for the capacity and the quantity. For example, if you had selected the unit of measure as hours when creating the service, enter the units for the capacity in hours, and the number of quantity units of the service.
 - b. From the **Available Skills** list, select the skill that is to be associated to the service item.
 - c. Click  to move the selected skill to the **Associated Skills** list.
10. Click **Save**.

The delivery service is associated to the item.

Modify a Delivery Service Associated to an Item

You can modify the details of the associated delivery service such as the service quantity required for a specified quantity of the item, the skill sets required for the service, and so on.

To modify a delivery service associated to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Task** panel, click **Manage Delivery Services**.

The Return Pickup Service Associations screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the **Services** panel, select the service that you want to modify.
 7. You can modify the following for the selected service:
 - a. the number of units of the service
 - b. the number of item quantity
 - c. service skill
 8. Click **Save** in the Item Details screen.

The delivery service associated to the item is modified.

Dissociate a Delivery Service from an Item

When you dissociate a delivery service from an item, the associated service skills are also dissociated from the item.

To dissociate a delivery service from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Delivery Services**.

The Delivery Service Associations screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the **Services** panel, select the service you want to disassociate from the item.
 7. The **Details** area is enabled with the details of the selected service. Click **Remove**.
 8. A message asking you for confirmation is displayed. Click **Yes** to remove the service.
- The selected service and the associated service skills are removed from the database.

Associate a Return Pickup Service to an Item

You can associate a return pickup service to an item to indicate if the item can be picked up from the customer's location in case the customer wants to return the item.


You can associate a return pickup service to an item from the Return Pickup Service Associations screen.

To associate a return pickup service to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Task** panel, click **Manage Return Pickup Services**.

The Return Pickup Service Associations screen is displayed, with the following read-only text boxes:

- Short Description
- Item Characteristic
- Status

6. In the **Services** panel, click **Add**.
7. The Basic Service Search dialog box is displayed. Enter the search criteria and click **Search**. Alternatively, you can use either the Basic Service Search or Advanced Search option to narrow down the list of services listed.
8. The Services panel with a list of services is displayed. Select a service, and click **Select**.
9. The details of the service is populated in the **Details** area. Perform the following steps:
 - a. In the **This service requires <number> of capacity to deliver <number of units> quantity**, enter the appropriate value for the capacity and the quantity. For example, if you had selected the unit of measure as hours when creating the service, enter the units for the capacity in hours, and the number of quantity units of the service.
 - b. From the **Available Skills** list, select the skill that is to be associated to the service item.
 - c. Click  to move the selected skill to the **Associated Skills** list.
10. Click **Save**.

The return pickup service is associated to the item.

Modify a Return Pickup Service Associated to an Item

You can modify the details of the associated return pick up service such as the service quantity required for a specified quantity of the item, the skill sets required for the service, and so on.

To modify a return pickup service associated to an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Task** panel, click **Manage Return Pickup Services**.

The Return Pickup Service Associations screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the **Services** panel, select the service that you want to modify.
 7. You can modify the following for the selected service:
 - a. the number of units of the service
 - b. the number of item quantity
 - c. service skill
 8. Click **Save** in the Item Details screen.

The return pickup service associated to the item is modified.

Dissociate a Return Pickup Service from an Item

When you dissociate a return pickup service from an item, the associated service skills are also dissociated from the item.

To dissociate a return pickup service from an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Task** panel, click **Manage Return Pickup Services**.

The Return Pickup Service Associations screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. From the **Services** panel, select the service that you want to modify.
 7. You can modify the following for the selected service:
 - a. the number of units of the service
 - b. the number of item quantity

The selected service and the associated service skills are removed from the database.

Manually Assign an Item and Define the Item Quantity for a Physical Kit or Bundle Item

In order to assemble a physical kit or bundle item, you can manually assign an item and define the quantity of the item that should be a part of the physical kit or bundle item.

You can manually assign an item and define the item quantity for a physical kit or bundle item from the Components screen.

To manually assign an item and define the item quantity for a physical kit or bundle item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
5. In the **Related Tasks** panel, click **Manage Components**.
 6. The Components panel is displayed, with the **Specify Manually** radio button selected by default. Click **Add Item**.
 7. The Basic Item Search dialog box is displayed. Enter the search criteria, and click **Search** to view all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items that are displayed.
 8. From the items list that is displayed, select the check box adjacent the corresponding item.
 9. Click **Select** to add the item to the item.
 10. The selected item is added to the items list. In the **Quantity** box, enter the quantity of the item that should be a part of the item kit or bundle. The box can neither be left blank nor can be assigned the value, 0. If either of these occurs, the value assigned to the item earlier will be displayed in the **Quantity** box.
 11. Click **Save**.

The item is assigned to the physical kit or bundle item, and the item quantity is also defined.

Manually Assign a Service Item and Define the Service Quantity for a Physical Kit or Bundle Item

In order to assemble a physical kit or bundle item, you can assign manually a service and define the quantity of the item that should be a part of the physical kit or bundle item. This service defines a process about how to assemble the item.

You can manually assign a service and define the service quantity for a physical kit or bundle item from the Components screen.

To manually assign a service item and define the service quantity for a physical kit or bundle item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
5. In the **Related Tasks** panel, click **Manage Components**.
 6. The Components panel is displayed, with the **Specify Manually** radio button selected by default. Click **Add Service**.
 7. The Basic Service Search dialog box is displayed. Enter the search criteria, and click **Search** to view all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** options to narrow down the list of services displayed.
 8. From the **Services** list that is displayed, select the check box adjacent the corresponding service.
 9. Click **Select**.
 10. The selected service is added to the services list. In the **Quantity** box, enter the quantity of the service that should be part of the item. The box can neither be left blank nor can be assigned the value, 0. If either of these occurs, the value assigned to the item earlier will be displayed in the **Quantity** box.
 11. Click **Save**.

The service is assigned to the physical kit or bundle item, and the service quantity is also defined.

Manually Remove an Existing Item or a Service from a Physical Kit or Bundle Item

To remove an existing an item or a service from a physical kit or bundle item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
5. In the **Related Tasks** panel, click **Manage Components**.
 6. The **Components** panel is displayed, with the **Specify Manually** radio button selected by default. Select the item or the service you want to remove from the item.
 7. Click **Remove**.
 8. A message asking you for confirmation is displayed. Click **Yes** to remove the selected service from the list.
 9. The selected item or the service is removed from the list.

Create a Configurable Item

You can create a configurable item by associating a model to it. A model represents all the possible valid configurations for that item. If an item is a configurable item, a customer can build an item in the Sterling Web application based on the associated model. You can also create preconfigurations of the configurable item in the Sterling Business Center application, which can be selected by customers in the Sterling Web application.

To create a configurable item, perform the following tasks:


1. Create a bundle item without components in the Sterling Business Center application. For more information, refer to [Create a Bundle Item](#).
2. Assigned the bundle item to a category in the master catalog. For more information, refer to [Assign an Item to a Category](#).
3. Set the bundle pricing strategy of the bundle item to **Include both parent and components**. For more information, refer to [Define the Merchandising and Sales Details of an Item](#).
4. Create a model in the Visual Modeler application and associate a Product ID to the model. This Product ID corresponds to the bundle item created in the Sterling Business Center application. For more information about defining models, refer to the *Visual Modeler: Administration Guide*.
5. Associate the model defined in the Visual Modeler application to the bundle item. For more information, refer to [Associate a Model to the Bundle Item](#).

Associate a Model to the Bundle Item

To associate a model to the bundle item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. In the Item Search screen that is displayed, enter the search criteria and click **Search** to view a list of all the available items. Alternatively, click **Advanced Search** to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink corresponding to the bundle item. Alternatively, double-click the row containing the corresponding **Item ID**.

The Primary Information screen is displayed, with the following read-only boxes:

- Short Description
 - Item Characteristic
 - Status
5. In the **Related Tasks** panel, click **Manage Components**.
 6. The **Components** panel is displayed. Select the **Use Configuration Model** radio button.
 7. Click  adjacent the **Configuration Model*** box to search for the model you want to use.

8. The Configuration Model dialog box is displayed. In the **Model Groups** tree, which displays only the models specific to your locale, select the model you want to use by clicking it, and click **Select**.

The selected model is displayed in the **Configuration Model*** box.

9. Click **Save**.

Note: * indicates that the field is mandatory.

After you have created a configurable item, you may continue to create various preconfigurations for this item. For more information, refer to [Create a Preconfigured Item](#).

Create a Preconfigured Item


After you have created a configurable item, you can create various preconfigurations for this item. A customer in the Sterling Web application can select from these preconfigurations and can modify the preconfiguration for which an order has been placed.

To create a preconfigured item, perform the following steps:

1. Create a bundle or physical kit item. For more information, refer to [Create a Bundle Item](#) or [Create a Physical Kit Item](#).
2. If you have created a bundle item, set the bundle pricing strategy of the bundle item to **Only include parent**. For more information, refer to [Define the Merchandising and Sales Details of an Item](#).
3. To complete creating preconfigured item, you must use a model that is associated to the configurable item for which you are defining this preconfiguration. For more information, refer to [Use a Model to Create an Item as a Preconfigured Item](#).

Use a Model to Create an Item as a Preconfigured Item

To use a model to create an item as a preconfigured item:

1. From the Primary Information screen corresponding to the item that you want to create as a preconfigured item, perform the following steps:
 - a. In the **Related Tasks** panel, click **Manage Components**.
 - b. The **Components** panel is displayed. Select the **Use Configuration Model** radio button.
 - c. Click  adjacent the **Configuration Model*** box to search for the model you want to use.
 - d. The Configuration Model dialog box is displayed. In the **Model Groups** tree, which displays only the models specific to your locale, navigate to the model that is associated to the configurable item for which you are defining this preconfiguration, and click **Select**.
 - e. The selected model is displayed in the **Configuration Model** box.
 - f. Select the **Is Pre-Configured** check box.

Note: The **Is Pre-Configured** check box is enabled only if you have selected a model in the Configuration Model dialog box.

2. Click **Update Configuration**.
3. The Item Configurator dialog box is displayed. Select the items with the corresponding configurations, and click **Save**.

The selected items with associated Item ID are displayed in the **Components** panel. However, the selected items without an associated Item ID are considered as item instructions and are not displayed in the **Components** panel.

4. Click **Save**.


Note: * indicates that the field is mandatory.

Change the Configuration Model of a Configurable or Preconfigured Item

To change the configuration model of a configurable or a preconfigured item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. In the Item Search screen that is displayed, enter the search criteria and click **Search** to view a list of all the available items. Alternatively, click **Advanced Search** to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the corresponding **Item ID** hyperlink. Alternatively, double-click the row containing the corresponding **Item ID**.

The Primary Information screen is displayed, with the following read-only boxes:

- Short Description
 - Item Characteristic
 - Status
5. In the **Related Tasks** panel, click **Manage Components**.
 6. The **Components** panel is displayed, with the configuration model populated in the **Configuration Model*** box. Click  adjacent the **Configuration Model*** box to search for the model you want to use.
 7. A message asking you for confirmation is displayed. Click **Yes** to change the model.
 8. The Configuration Model dialog box is displayed. In the **Model Groups** tree, which displays only the models specific to your locale, navigate to the model you want to use and click **Select**.

The selected model is displayed in the **Configuration Model*** box.

Notes:

- If a new model is associated to the configurable item, the earlier configurations are no longer applicable to the item.
 - If a new model is associated to the preconfigured item, the earlier preconfigurations are no longer applicable to the item. You must also select the **IsPreconfigured** check box and define a new preconfiguration for the newly selected model.
9. Click **Save**.

Note: * indicates that the field is mandatory.

Modify the Configuration of a Preconfigured Item

You can modify the configuration of a preconfigured item. For example, if a home theatre system is available with 1000 W speakers, and you want to change the configuration to 2000 W speakers, you can modify the configuration of the speakers.

To modify the configuration of a preconfigured item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. In the Item Search screen that is displayed, enter the search criteria and click **Search** to view a list of all the available items. Alternatively, click **Advanced Search** to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the corresponding **Item ID** hyperlink. Alternatively, double-click the row containing the corresponding **Item ID**.

The Primary Information screen is displayed, with the following read-only boxes:

- Short Description
 - Item Characteristic
 - Status
5. In the **Related Tasks** panel, click **Manage Components**.
 6. The **Components** panel is displayed, with the list of preconfigured items for the physical kit or bundle item. Click **Update Configuration**.
 7. The Item Configurator dialog box is displayed with the details of the preconfigured items. Modify the configuration of the preconfigured items by selecting the items with the appropriate configurations, and click **Save**.
 8. A message asking you for confirmation is displayed. Click **Yes**.

The selected items are displayed.

Note: * indicates that the field is mandatory.

Preview Item Details

After an item is created and its attributes are defined, you can preview the way the item details will be displayed to end users in the Sterling Web application. For example, if you change an item image, you can preview the way the corresponding item details screen appears with the new image in the Sterling Web application. Ensure that the following item configurations are performed:

- The item is entitled to the guest user in the Sterling Web application.
- The item is assigned to a catalog for which a catalog index has been created.

If any one of the above configurations is not performed, then when you click the **Preview Item Details** related task, a blank page is displayed.

Note: The **Preview Item Details** related task is disabled for items in the Held status, and for services.

To preview the details of an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Preview Item Details**. The corresponding item details screen of the Sterling Web application is displayed in a new browser window.

Add a Service Activity to a Value-Added Service



You can add a service activity to a value-added service, which can further be broken up into a series of instructions. A service activity instruction provides details about how to perform a service activity. For example, for the service activity, Adding accessories, you can have instructions such as where coupons must be placed in a package, how special labelling must be applied, and so on.

Note: You must add at least one service activity to a value-added service item for the inventory updates to occur using the `confirmWorkOrder()` or `confirmWorkOrderActivity()` API.

You can add a service activity to a value-added service from the Service Activities screen.

To add a service activity to a value added service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the Services panel that is displayed, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Service Activities**.
6. In the **Activities** panel that is displayed, click **Add**.
7. The Create Service Activity dialog box is displayed. From the **Activity Code*** drop-down list, select a service activity, and click **Save**.
8. The Service Activity dialog box is displayed. Depending on whether you want to use the predefined set of instructions, or you want to create new instructions or modify the instructions, perform one of the following:

If	Then
You have already created instructions and do not want to make any modifications to the instructions	Click Save to close the Activity Details dialog box.
You want to modify the sequence of instructions that you have already created	<ol style="list-style-type: none">1. Select the instruction row, and click either  or  to move the instruction to the required position on the instruction list. The position of the instruction on the instruction list indicates the sequence number of the instruction.2. Click Save to close the Activity Details dialog box.



If	Then
You have to add, modify, or remove an instruction	Refer to the following: <ul style="list-style-type: none"> ▪ To add a service activity instruction ▪ To modify a service activity instruction ▪ To remove a service activity instruction
	<p>To add a service activity instruction:</p> <ol style="list-style-type: none"> 1. In the Instructions panel, click Add. 2. In the Service Activity Instruction dialog box that is displayed, enter the Instruction URL that points to an existing service activity instructions for this service. For example, you may already have an existing procedure for inserting promotional materials into certain packages. 3. In the Instruction Usage text box, enter comments, if any, about how this service activity instruction must be used. 4. In the Instruction Text* box, enter details of the service activity instruction. 5. Click Save to close the Service Activity Instruction dialog box.
	<p>To modify a service activity instruction:</p> <ol style="list-style-type: none"> 1. In the Instructions panel, select the instruction you want to modify. The Details area is populated with the details of the selected Service Activity Instruction. 2. In the Instruction URL text box, modify the URL that points to an existing service activity instructions for this service. For example, you may already have an existing procedure for inserting promotional materials into certain packages. 3. In the Instruction Usage text box, modify comments, if any, about how this service activity instruction must be used. 4. In the Instruction Text* box, modify details of the service activity instruction. 5. To modify another instruction, repeat step 1 to step 4. Note: Do not clear the check box adjacent to an instruction when navigating between instructions. 6. Click Save to close the Service Activity dialog box.
	<p>To remove a service activity instruction:</p> <ol style="list-style-type: none"> 1. In the Instructions panel, select the instruction you want to remove. 2. Click Delete.

3. The service activity is added to the value-added service.

Modify a Service Activity for a Value-Added Service

To modify a service activity for a value added service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the Services panel that is displayed, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Service Activities**.
6. In the **Activities** panel, click the service activity row that you want to modify.
7. The Service Activity dialog box is displayed. Depending on whether you want to use the predefined set of instructions, or you want to create new instructions or modify the instructions, perform one of the following:

If	Then
You have already created instructions and do not want to make any modifications to the instructions	Click Save to close the Activity Details dialog box.
You want to modify the sequence of instructions that you have already created	<ol style="list-style-type: none">1. Select the instruction row, and click either  or  to move the instruction to the required position on the instruction list. The position of the instruction on the instruction list indicates the sequence number of the instruction.2. Click Save to close the Activity Details dialog box.
You have to add, modify, or remove an instruction	Refer to the following: <ul style="list-style-type: none">▪ To add a service activity instruction▪ To modify a service activity instruction▪ To remove a service activity instruction

If	Then
	<p>To add a service activity instruction:</p> <ol style="list-style-type: none"> In the Instructions panel, click Add. In the Service Activity Instruction dialog box that is displayed, enter the Instruction URL that points to an existing service activity instructions for this service. For example, you may already have an existing procedure for inserting promotional materials into certain packages. In the Instruction Usage text box, enter comments, if any, about how this service activity instruction must be used. In the Instruction Text* box, enter details of the service activity instruction. Click Save to close the Service Activity Instruction dialog box.
	<p>To modify a service activity instruction:</p> <ol style="list-style-type: none"> In the Instructions panel, select the instruction you want to modify. The Details area is populated with the details of the selected Service Activity Instruction. In the Instruction URL text box, modify the URL that points to an existing service activity instructions for this service. For example, you may already have an existing procedure for inserting promotional materials into certain packages. In the Instruction Usage text box, modify comments, if any, about how this service activity instruction must be used. In the Instruction Text* box, modify details of the service activity instruction. To modify another instruction, repeat step 1 to step 4. Note: Do not clear the check box adjacent to an instruction when navigating between instructions. Click Save to close the Service Activity dialog box.
	<p>To remove a service activity instruction:</p> <ol style="list-style-type: none"> In the Instructions panel, select the instruction you want to remove. Click Delete.

The service activity is modified.

Remove a Service Activity from a Value-Added Service

To remove a service activity from a value added service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the Services panel that is displayed, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Service Activities**.
6. From the Service Activities panel, select the service activity that you want to remove.
7. Click **Delete**.
8. A message asking you for confirmation is displayed. Click **Yes** to remove the service activity.
The service activity is removed from the value-added service.
Note: * indicates that the field is mandatory.

Add a Service Option to a Provided or Delivery Service

You can add a service option to a delivery or provided service in order to add additional capacity requirements for a service.

For example, let us assume that you have configured a 2-Man Deliver and Hookup delivery service item that you use when delivering projection TVs. You can also associate two delivery options with the delivery service item called, Remove Trash and Haul Away. With these options, customers can decide if they want the delivery men to remove the trash left behind from the projection TV box, as well as whether they want the delivery men to haul off their old TV.

You can add a service option to a delivery service or a provided service from the Service Options screen.

To add a service option to a Delivery Service or Provided Service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the Services panel that is displayed, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Service Options**.

The Service Options screen is displayed. The **Service Options** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. From the **Options** panel that is displayed, click **Add**.
 7. The Basic Service Option Search dialog box is displayed. Click **Search** to view the list of all the available service options. Alternatively, you can use either the **Basic Search** or **Advanced Search** options to narrow down the list of service options listed.
 8. Select one or more than one service option.
 9. Click **Select**.

The selected service option is added to service list in the **Options** panel.

Remove a Service Option from a Provided or Delivery Service

To remove a service option from a Delivery Service or Provided Service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the Services panel that is displayed, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Service Options**.



The Service Options screen is displayed. The **Service Options** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. From the **Options** panel in the Item Details screen, select the service option that you want to remove from the list.
 7. Click **Remove**.
 8. A message asking for confirmation is displayed. Click **Yes** to remove the selected service from the list. The selected service is removed from the service list in the **Options** panel.

Associate a Service Skill to a Provided Service or a Delivery Service

You can associate a service skill to a provided service or delivery service from the Service Skills screen. For example, you may want to associate electrical work as a service skill for an installation service.



To associate a service skill to a provided service or delivery service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Skills**.
6. The Service Skills screen is displayed. The **Service Skills** panel displays the following read-only boxes:
 - Short Description
 - Service Characteristic
 - Status
7. In the **Select the skill sets required for this service** area, perform the following:
 - a. From the **Available Skills** list, select the skill that is to be associated to the service item.
 - b. Click  to move the selected skill to the **Required Skills** list.
Tip: Click  to move all the available skills to the required skills list.
8. Click **Save**.

The selected skills are associated to the provided service or delivery service, and are included for the execution of either of the services.

Dissociate a Service Skill from a Provided Service or a Delivery Service

To dissociate a service skill from a provided service or delivery service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Skills**.
6. The Service Skills screen is displayed. The **Service Skills** panel displays the following read-only boxes:
 - Short Description
 - Service Characteristic
 - Status
7. In the **Skills** area, perform the following:
 - a. From the **Required Skills** list, select the skill that is to be disassociated from the service item.
 - b. Click  to move the selected skill from the **Required Skills** list.
Tip: Click  to move all the required skills to the available skills list.
8. Click **Save**.

The selected skills are dissociated from the provided service or delivery service, and excluded from the execution of either of the services.

Associate a Kitting and Dekitting Service to a Physical Kit or a Dynamic Physical Kit Item



You can associate a kitting service and a dekitting service only for an item type of physical kit or a dynamic physical kit from the Other Service Associations screen.

To associate a kitting and dekitting service to a physical kit or a dynamic physical kit item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Other Services**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
- Item Characteristic
- Status

6. In the **Kitting Service** text box, click  and perform the following steps:
 - a. In the Basic Service Search dialog box that is displayed, click **Search**. Alternatively, you can use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
 - b. Select the desired service from the list.
 - c. Click **Save**.
7. In the **Dekitting Service** text box, click  and perform the following steps:
 - a. In the Basic Service Search dialog box that is displayed, click **Search**. Alternatively, you can use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
 - b. Select the desired service from the list.
 - c. Click **Save**.
8. Click **Save** in the Other Service Associations screen.

The kitting or dekitting service is associated to the physical kit or a dynamic physical kit item

Dissociate a Kitting and Dekitting Service from a Physical Kit or a Dynamic Physical Kit Item

To dissociate a kitting and dekitting service from a physical kit or a dynamic physical kit item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, click the **Find Item** hyperlink in the home page.
3. From the Item Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available items. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel that is displayed, click the **Item ID** hyperlink. Alternatively, double-click the row containing the **Item ID**.
5. In the **Related Tasks** panel, click **Manage Other Services**.

The details screen is displayed, with the following read-only text boxes:

- Short Description
 - Item Characteristic
 - Status
6. In the **Kitting Service** text box, perform the following steps:
 - a. Select the text of the kitting service completely.
 - b. Click **Delete**.
 7. In the **Dekitting Service** box, perform the following steps:
 - a. Select the text of the kitting service completely.
 - b. Click **Delete**.
 8. Click **Save** in the Other Service Associations screen.
- The kitting or dekitting service is dissociated from the physical kit or dynamic physical kit item.

Define the Merchandising and Sales Details of a Service

For a service, you can provide additional information that can be viewed by the customer when the customer places an order. This additional information can also be used by the sales force when selling the item. For example, you may add an image for each of the locales the product is going to be sold in. However, you cannot define the merchandising and sales details of a value-added service.

You can define the merchandising and sales details for a service from the Merchandising and Sales Fields screen.

To define merchandising and sales details for a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink. Alternatively, double-click the row containing the **Service ID**.
5. In the **Related Tasks** panel, click **Manage Sales Information**.

The details screen is displayed, with the following read-only text boxes:


- Short Description
 - Service Characteristic
 - Status
6. In the **Extended Description** box, enter a detailed description about the service, including any notes or handling instructions.
 7. In the **Merchandising and Sales Fields** panel, perform the following steps:
 - a. From the **Server Location** drop-down list, select the location of the server where the image is located.
 - b. In the **Image Filename** box, enter the name of the image.
 - c. In the **Image Description** box, enter the description of the image.


Notes:

- An image of the item is displayed adjacent the **Item Main Image** field.

The **Assigned to categories** field is displayed only if the service is assigned to at least one category. Value of this field indicates the path to the corresponding categories in a catalog to which the service is assigned.

8. Click **Save**.

Note: If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short

Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).

The merchandising and sales details of a service are defined.

Associate a Keyword to a Service

A keyword act as an alternative identifier for a service. A keyword is a list of strings that can be used by the customer in the Sterling Web application when searching for a service. For example, keywords for the service Delivery are Home Delivery, Delivery, and so on. However, you cannot associate a keyword to a value-added service.

You can associate a keyword to a service from the Aliases and Keywords screen.

To associate a keyword to a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink. Alternatively, double-click the row containing the **Service ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Keywords** area, enter the keywords for the item. You can enter multiple keywords by separating each word with a comma.
 7. Click **Save**.

The keywords are associated to the service.

Dissociate a Keyword from a Service

You can dissociate a keyword from a service if you do not want the keyword to act as an alternative identifier for the service. If you have associated multiple keywords to a service, you can dissociate specific keywords and retain the required keywords.

To dissociate a keyword from a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink. Alternatively, double-click the row containing the **Service ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Keywords** area, delete the existing keywords.
 7. Click **Save**.

The keywords are dissociated from the service.

Associate an Alias to a Service

An alias acts as an alternate identifier for a service. You can configure one or more alias for a service. Examples for aliases include, but not limited to, SKU (Stock Keeping Unit), Alternate Item Id, UPC (Universal Product Code), EAN (European Article Number), and so on.

You can associate an alias to a service from the Aliases and Keywords screen.

To associate an alias to a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink. Alternatively, double-click the row containing the **Service ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Aliases** area, enter value for the configured alias types.
 7. Click **Save**.

The alias is associated to the service.

Dissociate an Alias from a Service

You can dissociate an alias from a service if you do not want an alternate identifier for a service.

To dissociate an alias from a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink. Alternatively, double-click the row containing the **Service ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Aliases** area, delete value of the existing alias types.
 7. Click **Save**.

The alias is dissociated from the service.

Associate an Exclusion Code to a Service

You can assign an exclusion code to a service if your business practices involve the regulation of service shipments for certain countries. For example, if there are certain countries that you ship-to that do not allow the shipment of certain hazardous materials, you can assign an exclusion code to the services that may contain the hazardous material.



By default, Sterling Selling and Fulfillment Foundation does not provide logic to handle service exclusion codes. This functionality is provided to enable the integration of Sterling Selling and Fulfillment Foundation with external systems that can handle service exclusion codes.

You can associate an exclusion code to a service from the Aliases and Keywords screen.

To associate an exclusion code to a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink. Alternatively, double-click the row containing the **Service ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Exclusion Codes** area is displayed. From the **Available Codes** list, select the exclusion code that you want to associate to the item.
 7. Click  to include the exclusion code in the **Subscribed Codes** list. To associate all the available codes to the **Subscribed Codes** list, click .
 8. Click **Save**.

The exclusion code is associated to the service.



Dissociate an Exclusion Code from a Service

You can dissociate an exclusion code from a service if your business practices do not involve the regulation of service shipments for certain countries.

To dissociate an exclusion code from a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, enter the search criteria, and then click **Search** to view a list of all the available services. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink. Alternatively, double-click the row containing the **Service ID**.
5. In the **Related Tasks** panel, click **Manage Aliases And Keywords**.

The Aliases and Keywords screen is displayed. The **Aliases, Keywords and Exclusion Codes** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Exclusion Codes** area is displayed. From the **Subscribed Codes** list, select the exclusion code that you want to dissociate from the item.
 7. Click  to include the exclusion code in the **Available Codes** list. To dissociate all the subscribed codes to the **Available Codes** list, click .
 8. Click **Save**.

The exclusion code is dissociated from the service.

Associate a Cross-Sell Service to a Service

You can assign a cross-sell service to an existing service to promote an add-on or accessory service, which when combined with the original service makes a better package. For example, a building supplier can associate installation of flooring to the delivery of flooring materials. The installation of flooring along with the delivery of the flooring materials provides a better package for the customer.




You can associate a cross-sell service to a service from the Service Associations screen.

To associate a cross-sell service to a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, select **Manage Cross-Sells**.

The Service Associations screen is displayed. The **Cross-Sell Associations** panel displays the following read-only text boxes:

- Short Description
- Service Characteristic
- Status

6. In the **Services** area, click **Add**.
7. The Add Association Service dialog box is displayed. Perform the following steps:
 - a. In the **Service ID* text box**, click  to search for a Service ID. The Basic Service Search dialog box is displayed. Click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of services displayed.
 - b. In the search results list that is displayed, select the service that must be associated as an alternative service, and click **Select**.
 - c. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the alternative item is associated with the service.
 - d. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the alternative item is associated with the service.
 - e. In the **Associated Quantity*** text box, enter the quantity of the associated service.
 - f. In the **Priority** field, enter the priority of the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An

association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.

- g. Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The cross-sell service is associated to the service.

Modify the Cross-Sell Service Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify a cross-sell service's details from the Service Associations screen.

To modify a cross-sell service's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Cross-Sells**.

The Service Associations screen is displayed. The **Cross-Sell Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the check box adjacent the corresponding service whose details you want to modify, and click **Modify**.
 7. The Modify Association Service dialog box is displayed. Perform the following modifications:
 - Select an **Effective Start Date***. Click  to view the calendar, and select a new date. The effective start date is the date from which the item is associated with the service.
 - Select an **Effective End Date***. Click  to view the calendar, and select a new date. The effective end date is the date until which the item is associated with the service.
 - In the **Associated Quantity*** text box, enter the new quantity of the associated service.
 - In the **Priority** field, enter the new priority for the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An association with the highest priority is displayed first in the list of associations displayed in Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The cross-sell service's details are modified.

Dissociate a Cross-Sell Service from a Service

To dissociate a cross-sell service from a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, select **Manage Cross-Sells**.

The Service Associations screen is displayed. The **Cross-Sell Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the item that you want to disassociate from a service.
 7. Click **Remove**.
 8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the service.
The selected service is removed from the service.




Associate an Up-Sell Service to a Service

You can assign an alternative service that is of a higher value as compared to the original service. Such an alternative service is called an up-sell service.

For example, in the inventory you may have computers with two services: installation and delivery. When you create a catalog item for the shirt with monogram type of service, you can associate the delivery of the shirt, which is more expensive, as an up-sell item. When the customer orders the shirt with a monogram, you can notify the customer about the delivery of the shirt.

You can associate a up-sell service to a service from the Service Associations screen.

To associate an up-sell service to a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The **Primary Information** panel is displayed. In the **Related Tasks** panel, click **Manage Up-Sells**.
The Service Associations screen is displayed. The **Up-Sell Associations** panel displays the following read-only text boxes:
 - Short Description
 - Service Characteristic
6. In the **Services** area, click **Add**.
7. The Add Association Service dialog box is displayed. Perform the following steps:
 - a. In the **Service ID* text box**, click  to search for a Service ID. The Basic Service Search dialog box is displayed. Click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of services displayed.
 - b. In the search results list that is displayed, select the service that must be associated as an alternative service, and click **Select**.
 - c. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the alternative item is associated with the service.
 - d. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the alternative item is associated with the service.
 - e. In the **Associated Quantity*** text box, enter the quantity of the associated service.
 - f. In the **Priority** field, enter the priority of the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An

association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.

- g. Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The up-sell service is associated to the service.

Modify the Up-Sell Service Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify a up-sell service's details from the Service Associations screen.

To modify a up-sell service's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Up-Sells**.

The Service Associations screen is displayed. The **Up-Sell Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the check box adjacent the corresponding service whose details you want to modify, and click **Modify**.
 7. The Modify Association Service dialog box is displayed. Perform the following modifications:
 - Select an **Effective Start Date***. Click  to view the calendar, and select a new date. The effective start date is the date from which the item is associated with the service.
 - Select an **Effective End Date***. Click  to view the calendar, and select a new date. The effective end date is the date until which the item is associated with the service.
 - In the **Associated Quantity*** text box, enter the new quantity of the associated service.
 - In the **Priority** field, enter the new priority for the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An association with the highest priority is displayed first in the list of associations displayed in Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The up-sell service's details are modified.

Dissociate an Up-Sell Service from a Service

To dissociate an up-sell service from a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The **Primary Information** panel is displayed. In the **Related Tasks** panel, click **Manage Up-Sells**.
The Service Associations screen is displayed. The **Up-Sell Associations** panel displays the following read-only text boxes:
 - Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the item that you want to disassociate from a service.
7. Click **Remove**.
8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the service.
The selected service is removed from the service.

Associate a Supersession Service to a Service

You can set up a supersession association for a service to indicate that the service can be superseded by one or more services. If a service is associated with a supersession service, then the original service is automatically superseded when its effective date becomes obsolete. For example, you can configure service A to be superseded by service B, which in turn can be superseded by service C; however, you cannot specify that both services B and C should directly supersede service A.

When you are configuring a supersession for a service, it is a good practice to specify services that are similar and are comparably-priced to the service that is being superseded.




You can associate a supersession service to a service from the Service Associations screen.

Note: A parent bundle item type cannot have an individual item as a supersession item.

To manage supersession associations for a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Supersessions**.

The Service Associations screen is displayed. The **Supersession Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, click **Add**.
 7. The Add Association Service dialog box is displayed. Perform the following steps:
 - a. In the **Service ID* text box**, click  to search for a Service ID. The Basic Service Search dialog box is displayed. Click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of services displayed.
 - b. In the search results list that is displayed, select the service that must be associated as an alternative service, and click **Select**.
 - c. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the alternative item is associated with the service.
 - d. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the alternative item is associated with the service.

- e. In the **Associated Quantity*** text box, enter the quantity of the associated service.
- f. In the **Priority** field, enter the priority of the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.
- g. Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The supersession service is associated to the service.

Modify the Supersession Service Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify a supersession service's details from the Service Associations screen.

To modify a supersession service's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Supersessions**.

The Service Associations screen is displayed. The **Supersession Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the check box adjacent the corresponding service whose details you want to modify, and click **Modify**.
 7. The Modify Association Service dialog box is displayed. Perform the following modifications:
 - Select an **Effective Start Date***. Click  to view the calendar, and select a new date. The effective start date is the date from which the item is associated with the service.
 - Select an **Effective End Date***. Click  to view the calendar, and select a new date. The effective end date is the date until which the item is associated with the service.
 - In the **Associated Quantity*** text box, enter the new quantity of the associated service.
 - In the **Priority** field, enter the new priority for the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An association with the highest priority is displayed first in the list of associations displayed in Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The supersession service's details are modified.

Dissociate a Supersession Service from a Service

To dissociate a supersession service from a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Supersessions**.

The Service Associations screen is displayed. The **Supersession Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the item that you want to disassociate from a service.
 7. Click **Remove**.
 8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the service.
The selected service is removed from the service.

Associate a Preferred Substitution Service to a Service

A preferred substitute is a service that must be fulfilled prior to fulfilling the original service, in an order. The system verifies and fulfills the order by shipping the preferred substitute service even when the original service is available. For example, if an order is placed for Service1, and the preferred substitute is Service2, then Service2 is depleted prior to shipping Service1.




Note: You cannot use a tag-controlled service as a preferred substitute.

You can associate a preferred substitution service to a service from the Service Associations screen.

To associate a preferred substitution service to a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Preferred Substitutions**.

The Service Associations screen is displayed. The **Substitution Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, click **Add**.
 7. The Add Association Service dialog box is displayed. Perform the following steps:
 - a. In the **Service ID* text box**, click  to search for a Service ID. The Basic Service Search dialog box is displayed. Click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of services displayed.
 - b. In the search results list that is displayed, select the service that must be associated as an alternative service, and click **Select**.
 - c. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the alternative item is associated with the service.
 - d. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the alternative item is associated with the service.
 - e. In the **Associated Quantity*** text box, enter the quantity of the associated service.

f. In the **Priority** field, enter the priority of the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.

g. Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

8. Click **Save**.

The preferred substitution service is associated to the service.

Modify the Preferred Substitution Service Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify a preferred substitution service's details from the Service Associations screen.

To modify a preferred substitution service's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Preferred Substitutions**.

The Service Associations screen is displayed. The **Preferred Substitution Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the check box adjacent the corresponding service whose details you want to modify, and click **Modify**.
 7. The Modify Association Service dialog box is displayed. Perform the following modifications:
 - Select an **Effective Start Date***. Click  to view the calendar, and select a new date. The effective start date is the date from which the item is associated with the service.
 - Select an **Effective End Date***. Click  to view the calendar, and select a new date. The effective end date is the date until which the item is associated with the service.
 - In the **Associated Quantity*** text box, enter the new quantity of the associated service.
 - In the **Priority** field, enter the new priority of the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An association with the highest priority is displayed first in the list of associations displayed in Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The preferred substitution service's details are modified.

Dissociate a Preferred Substitution Service from a Service

To dissociate a preferred substitution service from a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Preferred Substitutions**.

The Service Associations screen is displayed. The **Substitution Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the item that you want to disassociate from a service.
 7. Click **Remove**.
 8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the service.
The selected service is removed from the service.




Associate an Alternative Service to a Service

For a service, you can set up an alternative service so that you have the option to selecting a service that is very similar to the original as an alternative. When a customer places an order for the original service and the original service is not available, then the customer is provided an option to select an alternative service and place an order.

You can associate an alternative service to a service from the Service Associations screen.

Note: A parent bundle item type cannot have an individual item as an alternate item.

To associate an alternative service to a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Alternative**. The Service Associations screen is displayed. The **Alternate Associations** panel displays the following read-only text boxes:
 - Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, click **Add**.
7. The Add Association Service dialog box is displayed. Perform the following steps:
 - a. In the **Service ID* text box**, click  to search for a Service ID. The Basic Service Search dialog box is displayed. Click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of services displayed.
 - b. In the search results list that is displayed, select the service that must be associated as an alternative service, and click **Select**.
 - c. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the alternative item is associated with the service.
 - d. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the alternative item is associated with the service.
 - e. In the **Associated Quantity*** text box, enter the quantity of the associated service.
 - f. In the **Priority** field, enter the priority of the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An

association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.

- g. Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

- 8. Click **Save**.

The alternative service is associated to the service.

Modify the Alternative Service Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify an alternative service's details from the Service Associations screen.

To modify an alternative service's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Alternative**.

The Service Associations screen is displayed. The **Alternate Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the check box adjacent the corresponding service whose details you want to modify, and click **Modify**.
 7. The Modify Association Service dialog box is displayed. Perform the following modifications:
 - Select an **Effective Start Date***. Click  to view the calendar, and select a new date. The effective start date is the date from which the item is associated with the service.
 - Select an **Effective End Date***. Click  to view the calendar, and select a new date. The effective end date is the date until which the item is associated with the service.
 - In the **Associated Quantity*** text box, enter the new quantity of the associated service.
 - In the **Priority** field, enter the new priority for the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An association with the highest priority is displayed first in the list of associations displayed in Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The alternative service's details are modified.

Dissociate an Alternative Service from a Service

To dissociate an alternative service from a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Alternative**. The Service Associations screen is displayed. The **Alternate Associations** panel displays the following read-only text boxes:
 - Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the item that you want to disassociate from a service.
7. Click **Remove**.
8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the service. The selected service is removed from the service.

Associate a Competitive Service to a Service




A competitive association allows you to associate two competing brands of a service. When a customer places an order for the original service, the customer is provided an option to view the competitive service and compare the services.

You can associate a competitive service to a service from the Item Associations screen.

To associate a competitive service to a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Competitive**.

The Service Associations screen is displayed. The **Competitive Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, click **Add**.
 7. The Add Association Service dialog box is displayed. Perform the following steps:
 - a. In the **Service ID* text box**, click  to search for a Service ID. The Basic Service Search dialog box is displayed. Click **Search** to view the list of available items. You can use either the **Basic Search** or **Advanced Search** option to narrow down the list of services displayed.
 - b. In the search results list that is displayed, select the service that must be associated as an alternative service, and click **Select**.
 - c. Select an **Effective Start Date***. Click  to view the calendar, and select a date. The effective start date is the date from which the alternative item is associated with the service.
 - d. Select an **Effective End Date***. Click  to view the calendar, and select a date. The effective end date is the date until which the alternative item is associated with the service.
 - e. In the **Associated Quantity*** text box, enter the quantity of the associated service.
 - f. In the **Priority** field, enter the priority of the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An association with the highest priority is displayed first in the list of associations displayed in the Sterling Web application.

g. Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The competitive service is associated to the service.

Modify the Competitive Service Details



You can modify the date range in which the association is active. You can also modify the associated quantity and the priority of the associated item.

You can modify a competitive service's details from the Service Associations screen.

To modify a competitive service's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The item details are displayed in the Primary Information screen. In the **Related Tasks** panel, click **Manage Competitive**.

The Service Associations screen is displayed. The **Competitive Associations** panel displays the following read-only text boxes:

- Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the check box adjacent the corresponding service whose details you want to modify, and click **Modify**.
 7. The Modify Association Service dialog box is displayed. Perform the following modifications:
 - Select an **Effective Start Date***. Click  to view the calendar, and select a new date. The effective start date is the date from which the item is associated with the service.
 - Select an **Effective End Date***. Click  to view the calendar, and select a new date. The effective end date is the date until which the item is associated with the service.
 - In the **Associated Quantity*** text box, enter the new quantity of the associated service.
 - In the **Priority** field, enter the new priority for the associated service. Services with the highest priority are considered first when the service is automatically substituted during scheduling. An association with the highest priority is displayed first in the list of associations displayed in Sterling Web application.
 - Click **Save** to save the details, and close the dialog box.

Note: * indicates that the field is mandatory.

The competitive service's details are modified.

Dissociate a Competitive Service from a Service

To dissociate a competitive service from a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all available services. Alternatively, use either the **Basic Search** or the **Advanced Search** to narrow down the list of services displayed.
4. From the search results list that is displayed in the **Services** panel, click the **Service ID** hyperlink.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Competitive**. The Service Associations screen is displayed. The **Competitive Associations** panel displays the following read-only text boxes:
 - Short Description
 - Service Characteristic
 - Status
6. In the **Services** area, select the item that you want to disassociate from a service.
7. Click **Remove**.
8. A message asking you for confirmation is displayed. Click **Yes** to disassociate the service. The selected service is dissociated from service.

Add an Asset to a Service

Assets are electronic media objects that you associate with items, categories, attributes, and attribute values. Asset types include images, video, audio, and text files.

You must specify the content location for each of the assets. Typically, assets are digitally-based objects that reside on external systems. For example, you can assign an image file to a category that is available from an online catalog so that online customers can view an image that represents this category. In such a scenario, you must provide a content location for the image file. Content location is the path that identifies the location of the image file.

You can add an asset to a service from the Assets screen.

To add an asset to a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Service Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink. Alternatively, double-click the row containing the **Service ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Assets**.
6. The **Assets** panel is displayed. Click **Add**.
7. The Asset Detail dialog box is displayed. Perform the following steps:
 - a. In the **Asset ID*** box, enter a unique identifier (ID) for the asset.
 - b. In the **Short Description*** box, enter a brief description of the asset.
 - c. In the **Long Description** box, enter a detailed description of the asset.
 - d. From the **Server** drop-down list, select the server on which this asset type is located. The drop-down list is either populated by all the available server locations, or the codes that are configured in the Applications Manager.
 - e. From the **Type** drop-down list, select the asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - f. In the **File** box, enter the name of the file.
 - g. Click **Save**.

Note: * indicates that the field is mandatory.

A new asset is added to the selected service.

Modify an Asset for a Service

You can choose to modify the short description and description of an asset. You can also modify the location of the server, asset type, and the name of the file in which the asset is created.

To modify an asset for a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Service Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink. Alternatively, double-click the row containing the **Service ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Assets**.
6. The **Assets** panel is displayed. Select the check box adjacent the asset you want to modify.
7. The **Asset Detail** area is displayed. Make the necessary modifications:
 - In the **Short Description*** box, enter a new brief description of the asset.
 - In the **Long Description** box, enter a new detailed description of the asset.
 - From the **Server** drop-down list, select a new server on which this asset type is located.
 - From the **Type** drop-down list, select a new asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - In the **File** box, enter a new name of the file.
 - Click **Save**.

Note: The **Asset ID** text box is displayed as read-only.

The asset is modified.

Delete an Asset from a Service

You can delete an asset from a service if you do not want any of the electronic media objects to be added to the service.

To delete an asset from a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. From the Service Search screen that is displayed, click **Search** to view a list of all the available services. Alternatively, use either the **Basic Service Search** or the **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** hyperlink. Alternatively, double-click the row containing the **Service ID**.
5. The Primary Information screen is displayed. In the **Related Tasks** panel, click **Manage Assets**.
6. The **Assets** panel is displayed. Select the check box adjacent the asset you want to remove.
7. Click **Delete**.
8. A message asking you for confirmation is displayed. Click **Yes** to delete the asset.
The asset is deleted from the corresponding service.

Generate a New Search Index

When item searches are performed through the Sterling applications, the application performs a search against an index. The search index is a set of files generated by the Sterling Business Center application's index-building functionality, which enables faster and more efficient searches. Typically, search indexes are generated when a new catalog is defined, or many changes are made to an existing catalog. In order to update the search index to meet the definition of the catalog, a new search index is generated.

Note: Only the attributes with allowed values and the usage, For Filter, are used when generating a new search index.

You can generate a new search index from the Item Catalog Index List screen.

To generate a new search index:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalog Indexes**. Alternatively, click the **Manage Catalog Indexes** hyperlink in the home page.
3. The Item Catalog Index List screen is displayed. In the **Related Tasks** panel, click **Create Index**.
4. The Select The Catalog To Build The Index dialog box is displayed. Click the row containing the corresponding Catalog ID, and click **Select**.

A new record with its status as **In Progress** is added to the table in the **Index List** panel.

Only attributes of usage 'For Filter' with allowed values are considered when generating a new search index.

Generate an Incremental Search Index

Over a period of time, you may have added new products, features, data sheets, and so on to your product catalog. You may have also decided that certain search characteristics are more important than others and should therefore be weighed differently. In such a scenario, you must generate a new index based on an existing index as also the product catalog changes made since the existing index was built. An incremental index build is the best way of generating an index when you have made only a few changes to the corresponding catalog. In such a scenario, building an incremental index takes less time to complete than creating a new index.

You can generate an incremental search index from the Item Catalog Index List screen.

To generate an incremental search index:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalog Indexes**. Alternatively, click the **Manage Catalog Indexes** hyperlink in the home page.
3. The Item Catalog Index List screen is displayed. Select the check box adjacent the corresponding index. To generate multiple incremental search indexes, select the check boxes adjacent the required indexes.
4. Click **Incremental Build**.

Note: This button is enabled only if you have selected a record that is in either the **Active** status or the **Complete** status.

A new record with its status as **In Progress** is added to the table in the **Index List** panel.

Activate a Search Index

After a new index build is completed, you can activate it so that it can be used when item searches are performed.

Note: Only one index file can be active at a time for a catalog organization and a subcatalog organization.

You can activate the index from the Item Catalog Index List screen after running a new or incremental search index build.

To activate a search index file:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalog Indexes**. Alternatively, click the **Manage Catalog Indexes** hyperlink in the home page.
3. The Item Catalog Index List screen is displayed. Select the check box adjacent the corresponding index you want to activate.
4. Click **Activate**. This button is enabled only if you have selected a record that is in the **Complete** status.

Note: When you activate an index, the status of the index is displayed as **Active**.

The search index is activated.

Delete a Search Index

You cannot delete an active search index.

You can delete a search index from the Item Catalog Index List screen.


To delete a search index:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalog Indexes**. Alternatively, click the **Manage Catalog Indexes** hyperlink in the home page.
3. The Item Catalog Index List screen is displayed. In the **Index List** panel, select the check box adjacent the index you want to delete.
4. Click **Delete**.
5. A message asking you for confirmation is displayed. Click **Yes** to delete the index.
The search index is deleted.

Delete Search Indexes by Date

You can delete search indexes by date from the Item Catalog Index List screen.

To delete search indexes that are older than a specified date:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalog Indexes**. Alternatively, click the **Manage Catalog Indexes** hyperlink in the home page.
3. The Item Catalog Index List screen is displayed. In the **Related Tasks** panel, click **Delete Old Indexes**.
4. The Delete Old Indexes dialog box is displayed. Perform the following steps:
 - a. In the **Delete Indexes Older Than*** box, enter a date. Alternatively, click  to select a date. Indexes older than the date will be deleted.

Note: Ensure that the date is not later than the build timestamp of the active index because you cannot delete an active index.
 - b. Click **Confirm**.
 - c. A message asking you for confirmation is displayed. Click **Yes** to delete the search indexes older than the date.

Note: * indicates that the field is mandatory.
Search indexes older than the date are deleted.

Delete an Item

You can delete an existing item that is no longer required. However, you can delete an item only if it is in **Held** status.

Caution: Before you delete an item, you must consider the fact that the item may be used in existing transaction data for inventory, orders, ship advises, returns, distribution rules, and/or price sets. Also, depending on your configuration, external systems may also be referencing this item.

You can delete an item from the Primary Information screen.

To delete an item:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Item**. Alternatively, you can click the **Find Item** hyperlink in the home page.
3. The Basic Item Search screen is displayed. Click **Search** to view a list of all available items. Alternatively, you can use either the **Basic Search** or **Advanced Search** option to narrow down the list of items displayed.
4. In the **Items** panel with the list of items that is displayed, click the **Item ID** hyperlink of the item you want to delete.
5. The item details are displayed in the Primary Information screen. Click **Delete**.
Note: The **Delete** button is displayed only if you have the user privileges to delete an item.
6. A message asking you for confirmation is displayed. Click **Yes** to delete the service.
The item is deleted, and the list of items is updated.

Delete a Service

You can delete an existing service that is no longer required. However, you can delete a service only if it is in **Held** status.

Caution: Before you delete a service, you must consider the fact that the service may be used in existing transaction data for inventory, orders, ship advises, returns, distribution rules, or price sets. Also, depending on your configuration, external systems may also be referencing this service.

You can delete a service from the Primary Information screen.

To delete a service:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Service**. Alternatively, you can also click the **Find Service** hyperlink in the home page.
3. The Service Search screen is displayed. Click **Search** to view the list of all available services. Alternatively, use either the **Basic Search** or **Advanced Search** option to narrow down the list of services displayed.
4. In the **Services** panel that is displayed, click the **Service ID** of the service you want to delete.
5. The services details is displayed in the Primary Information screen. Click **Delete**.
Note: The **Delete** button is enabled only if you have the user privileges to delete a service.
6. A message asking you for confirmation is displayed. Click **Yes** to delete the service.
The service is deleted, and the list of services is updated.

Define the Attribute Domain Details

An attribute domain is a set of attribute groups containing similar attribute types. For example, the item attribute domain contains attribute groups that are used for items. You can create attribute groups, and their associated attributes under the ItemAttribute domain. The unique identifier (ID) of the attribute domain is ItemAttribute, and this attribute domain ID is created when a catalog organization is created in the Applications Manager.

You can define the details of the attribute domain from the Attribute Management screen.

To define the details of the attribute domain:



1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. Perform the following steps:
 - In the **Short Description*** text box, enter a brief description of the attribute domain. The attribute domain in the **Item Attributes** tree will be identified by this description.
 - In the **Long Description** text box, enter a detailed description of the attribute domain. This detailed description typically contains any additional information about the attribute domain.

Notes:

•The Attribute Domain ID is a read-only box.

•* indicates that the field is mandatory.

4. In the Attribute Management screen, click **Save**.

Note: If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).

The details of the attribute domain are defined. You can now create attribute groups for the attribute domain, and associate the corresponding attributes to these attribute groups.

Create an Attribute Group

An attribute group is used to group a set of attributes that share a common purpose. For example, you can define an attribute group called Entertainment, which contains entertainment-related attributes for different types of items.

You can create multiple levels of attribute groups. This allows you to manage large numbers of attributes by prioritizing and organizing the attributes. You can create an attribute group for the attribute domain, or an attribute group that is a subgroup of an existing attribute group.

You can create an attribute group from the Attribute Management screen.

To create an attribute group:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. In the **Item Attributes** panel, select any one of the following from the tree:
 - The attribute domain - The attribute group will be created directly under the attribute domain.
 - An existing attribute group - The attribute group will be created under the existing attribute group.

Note: When a user views attributes that are assigned to an item in Sterling Web application, the attributes and their assigned values are displayed based on the grouping specified in the tree in the **Item Attributes** panel.

4. In the **Related Tasks** panel, click **Create Attribute Group**.
5. The **Attribute Group Details** panel is displayed. Perform the following steps:
 - a. In the **Attribute Group ID*** box, enter an identifier (ID) for the attribute group. This ID should be unique across the corresponding attribute domain, and cannot be modified after it has been defined.
 - b. In the **Short Description*** box, enter a brief description of the attribute group. The attribute group in the **Item Attributes** tree will be identified by this description. This short description is also displayed in Sterling Web application and other screens in Sterling Business Center, which display item attributes.
 - c. In the **Long Description** box, enter a detailed description of the attribute group. This detailed description typically contains any additional information about the attribute group.
6. In the Attribute Management screen, click **Save**.

Note: * indicates that the field is mandatory.

A new attribute group is created and displayed hierarchically in the **Item Attributes** tree.



Modify an Attribute Group

To modify an attribute group:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the tree in the **Item Attributes** tree, select the attribute group that you want to modify.
4. The **Attribute Group Details** panel containing the details of the selected attribute group is displayed. Make the necessary modifications:
 - In the **Short Description*** text box, you can modify the brief description of the attribute group.
 - In the **Long Description** text box, you can modify the detailed description of the attribute group.

Note: The **Attribute Group ID** is a read-only box.
5. In the Attribute Management screen, click **Save**.

Notes:

- * indicates that the field is mandatory.
- If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).

The attribute group is modified, and the modified short description is displayed hierarchically in the **Item Attributes** tree.

Create an Attribute

Attributes are characteristics or specifications that define the corresponding items. For example, the attributes of a computer may include:

- Type of CPU
- Hard drive size in GB
- Number of USB ports

An attribute is unique to the attribute group for which it is created. The following types of attributes can be created:

- Attribute with valid values - You can create a text attribute, Boolean attribute, or number attribute, and define valid values for each attribute.
- Attribute that refers to an item field - You can create an attribute that refers to an out-of-the-box item field. Thus, values for this attribute can be specified in the item administration screens.
- Derived attribute - You can derive an attribute from another attribute and define the ranges for the derived attribute. These ranges are used for searching items or categories in Sterling Web application.
- Computed attribute - You can create a computed attribute that is specific to the pricing administration.

Note: Only the attributes with allowed values and the usage, For Filter, will be used when generating a new search index.

You can create an attribute from the Attribute Management screen.


To create an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the tree in the **Item Attributes** panel, select an attribute group under which you want to create an attribute. When a user views the attributes of an item in the Sterling Web application, the attributes and their assigned values are displayed based on the grouping specified in the tree in the **Item Attributes** panel.
4. In the **Related Tasks** panel, click **Create Attribute**.
5. The **Manage Attribute Details** panel is displayed. Perform the following steps:
 - a. In the **Attribute ID*** box, enter a unique identifier (ID) for the attribute. This identifier cannot be modified after it has been defined. Do not put a space or special characters in the Attribute ID.
 - b. In the **Short Description*** box, enter a brief description of the attribute. The attribute in the **Item Attributes** tree will be identified by this description. This short description is also displayed in Sterling Web application and other screens in Sterling Business Center, which display item attributes.
 - c. In the **Long Description** field, enter a detailed description of the attribute. This detailed description typically contains any additional information about the attribute.
 - d. From the **Postfix** drop-down list, select the postfix of the attribute. When an attribute is displayed with its corresponding value, the selected postfix is appended to the value. For example, you can

select Inches to define the unit of length. You must add a postfix to the **Postfix** drop-down list by clicking **Manage Postfix** in the **Manage Attribute Details** panel when you are creating an attribute. After you have added a postfix, you can also modify and delete the postfix by clicking **Manage Postfix** in the **Manage Attribute Details** panel.

- e. From the radio buttons under the **Attribute Type** area, select the type of attribute that you want to create, and specify the attribute type fields in the **Attribute Type Specific Fields** area. (When a radio button in the **Attribute Type** area is selected, the corresponding description is displayed in the **Attribute Type Specific Information** area.)

The following table describes this task in detail:

In Attribute Type Area, If You Select This	Perform These Steps In The Attribute Type Specific Fields Area
Attribute with valid values	<p>From the Value Type* drop-down list, select the format for the attribute.</p> <ul style="list-style-type: none"> ▪ Text Attribute - A free-formed text or a list of values from which you can select one or more. ▪ Number Attribute - It can be any number, an integer, a floating value, and so on. ▪ Boolean Attribute - The valid values are either True or False.
Refers to an item field	<ol style="list-style-type: none"> 1. Under Reference Type, select either the Item Field radio button or the Item Alias radio button. If you select the Item Field radio button, the Item Field* drop-down list is displayed. Otherwise, the Item Alias* drop-down list is displayed. 2. From the drop-down list that is displayed, select the appropriate value. The options displayed in the Item Field* drop-down list are the out-of-the-box fields that are displayed in the screens pertaining to the item administration. The item aliases displayed in the Item Alias* drop-down list are displayed in the Aliases and Keywords screen within the item administration screens of Sterling Business Center.
Derived from another attribute	<ol style="list-style-type: none"> 1. Click  next to the Derived From* box, to locate the number attribute to derive from. 2. The Attribute Search dialog box is displayed. Select a number attribute, and click Select. Attributes other than number attributes are disabled in the tree in the Attribute Search dialog box.
Computed Attribute	Information about the setup for this attribute type is displayed.

- f. In the Attribute Management screen, click **Save**.

Notes:

- * indicates that the field is mandatory.
- When you create an attribute either as a computed attribute or an attribute that refers to an item field, you cannot modify the attribute's type.
- When you create an attribute that is not a computed attribute, you cannot modify the attribute to be a computed attribute. That is, if you want to modify an attribute type, delete the attribute and create a new attribute of that attribute type.

- When a new search index is generated, only the attributes with allowed values and the usage, For Filter, are considered.

A new attribute is displayed under the selected attribute group in the **Item Attributes** tree along with the corresponding details panel. For example, if you have created a text attribute, the **Text Attribute Properties** panel is displayed. You can now define the properties for the text attribute.

See also:

- [Add a Postfix to an Attribute Value](#)
- [Modify a Postfix for an Attribute Value](#)
- [Remove a Postfix](#)

Modify the Details of an Attribute


You can modify the details of an attribute. However, if your attribute type is Computed Attribute, you cannot modify the attribute type. To define the details of the attribute domain:

To modify the details of an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select the attribute whose details you want to modify.
4. In the **Related Tasks** panel, click **Attribute Details**.
5. The **Manage Attribute Details** panel is displayed. Make the necessary modifications:
 - ⌵ In the **Short Description*** text box, modify the brief description of the attribute. The attribute in the **Item Attributes** panel is identified by this description. This short description is also displayed in Sterling Web application and other screens in Sterling Business Center, which display item attributes.
 - ⌵ In the **Long Description** field, modify the detailed description of the attribute. This detailed description typically contains any additional information about the attribute.
 - ⌵ From the **Postfix** drop-down list, select a new postfix.
 - ⌵ From the radio buttons under the **Attribute Type** area, select a new type of attribute, and specify the attribute type fields in the **Attribute Type Specific Fields** area. (When a radio button in the **Attribute Type** area is selected, the corresponding description is displayed in the **Attribute Type Specific Information** area.)



The following table describes this task in detail:

In Attribute Type Area, If You Select This	Perform These Steps In The Attribute Type Specific Fields Area
Attribute with valid values	From the Value Type* drop-down list, select the format for the attribute. <ul style="list-style-type: none">▪ Text Attribute - A free-formed text or a list of values from which you can select one or more.▪ Number Attribute - It can be any number, an integer, a floating value, and so on.▪ Boolean Attribute - The valid values are either True or False.

In Attribute Type Area, If You Select This	Perform These Steps In The Attribute Type Specific Fields Area
Refers to an item field	<ol style="list-style-type: none"> 1. Under Reference Type, select either the Item Field radio button or the Item Alias radio button. If you select the Item Field radio button, the Item Field* drop-down list is displayed. Otherwise, the Item Alias* drop-down list is displayed. 2. From the drop-down list that is displayed, select the appropriate value. The options displayed in the Item Field* drop-down list are the out-of-the-box fields that are displayed in the screens pertaining to the item administration. The item aliases displayed in the Item Alias* drop-down list are displayed in the Aliases and Keywords screen within the item administration screens of Sterling Business Center.
Derived from another attribute	<ol style="list-style-type: none"> 1. Click  next to the Derived From* box, to locate the number attribute to derive from. 2. The Attribute Search dialog box is displayed. Select a number attribute, and click Select. Attributes other than number attributes are disabled in the tree in the Attribute Search dialog box.
Computed Attribute	Information about the setup for this attribute type is displayed.

- ⌵ In the Attribute Management screen, click **Save**.

Notes:



- ⌵ If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).
- ⌵ * indicates that the field is mandatory.

The attribute is modified and displayed under the selected attribute group in the **Item Attributes** tree.

Modify the Sequence of Attribute Groups and Attributes

You can modify the sequence of attribute groups and attributes in order to group them logically. The sequence of the attribute groups and attributes determines the sequence in which the attributes are displayed in Sterling Web application when a customer views the details of the corresponding item.

To modify the sequence of attribute groups or attributes:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. In the tree of the **Item Attributes** panel, perform one of the following tasks to modify the sequence of attribute groups and attributes.
 - ⌵ Select the attribute group or attribute whose sequence you want to change and either click  to move it one position above the current position in the tree view, or click  to move it one position below the current position in the tree view. These icons enable you to move the attribute group or attribute only one position above or below within the same attribute group.
 - ⌵ Select the attribute group or attribute and drag it to the position at which you want to place it. The position of the selected attribute group or attribute is modified.

The sequence of attribute groups and attributes is modified.

Notes:

- ⌵ You cannot move an attribute between different attribute groups.
- ⌵ You cannot move a child attribute group between different parent attribute groups.

Assign a List of Values to a Text Attribute

A Text attribute can be assigned defined list of values, such as small, medium, and large. You can specify whether an attribute can have multiple values assigned to it, and the default value.

You can define the properties of a text attribute only if you have selected the **Attribute with valid values** radio button, and the **Text Attribute** option from the **Value Type*** drop-down list in the **Manage Attribute Details** panel when creating an attribute.

You can assign a list of values to a text attribute from the Attribute Management screen.

To assign a list of values to a text attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select the corresponding attribute.
4. In the **Text Attribute Properties** panel that is displayed, select the **Defined List Of Values** radio button.
5. Select the **Allow assignment of multiple values** check box to enable the assignment of multiple values when the attribute is assigned to a category of an item.
6. Select the **Must have an assigned value on the associated items** check box to make the assignment of a value for this attribute mandatory. If you select this check box, you cannot delete the default value of the attribute.
7. In the **Valid Values** area, click **Add**.
8. The New Value dialog box is displayed. Perform the following steps:
 - a. In the **Value*** box, enter the identifier of the value.
 - b. In the **Short Description*** box, enter a brief description of the value.
 - c. Click **Save**.

The value is assigned to the text attribute and is displayed in the **Valid Values** panel.

Note: When you assign a new text attribute value for an item, it is, by default, added at the end of the existing text attribute values list. If the existing text attributes values list is more than one page, the newly added text attribute value is displayed as the last entry on the last page.



9. In the **Valid Values** panel, select the **Default** check box to make this value the default value of the attribute.

Note: If a value is made as the default value of an attribute and this attribute is assigned to a category, then the value is displayed by default in the corresponding field of the Attribute Management screen pertaining to the category. However, unless you click **Save**, this value is not assigned by default to the items in that category.

10. To assign a list of values to the text attribute, repeat step 7 through 9.



11. Click **Save**.

Notes:

⌵ If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).

⌵ * indicates that the field is mandatory.

After you have saved the text attribute value, you can manage assets for each of the text attribute values by clicking the **Asset <number of assets>** hyperlink. The number in the parenthesis indicates the number of assets that are currently associated to the text attribute value.

You can modify the sequence of the attribute values by either clicking  or . However, rearranging the text attribute values is limited to a single results page. For example, if the list of text attribute value exceeds one page, you cannot move a text attribute value from Page 1 to Page 2, or from Page 2 to Page 1.

See also:

- ⌵ [Add Allowed Value Assets to a Text Attribute](#)
- ⌵ [Modify Allowed Value Assets for a Text Attribute](#)
- ⌵ [Delete Allowed Value Assets from a Text Attribute](#)

Assign Free-Form Text Values to a Text Attribute

A Text attribute can be assigned a free-form text. You can specify whether an attribute can have multiple values assigned to it, the maximum character length for free-form text, and the default value.

You can define the properties of a text attribute only if you have selected the **Attribute with valid values** radio button, and the **Text Attribute** option from the **Value Type*** drop-down list in the **Manage Attribute Details** panel when creating an attribute.

You can assign free-form text values to a text attribute from the Attribute Management screen.



To assign free-form text values to a text attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select the corresponding attribute.
4. In the **Text Attribute Properties** panel that is displayed, select the **Free Form Text** radio button.
5. In the **Max Character Length** box, enter the maximum character length that can be taken by the value.
6. Select the **Allow assignment of multiple values** check box to enable the assignment of multiple values when the attribute is assigned to a category of an item.
7. Select the **Must have an assigned value on the associated items** check box to make the assignment of a value for this attribute mandatory. If you select this check box, you cannot delete the default value of the attribute.
8. In the **Default Values** area, click **Add**.
9. The New Value dialog box is displayed. Perform the following steps:
 - a. In the **Value*** box, enter the identifier of the value.
 - b. Click **Save**.

Notes:

- ⋮ If a value is made as the default value of an attribute and this attribute is assigned to a category, then the value is displayed by default in the corresponding field of the Attribute Management screen pertaining to the category. However, unless you click **Save**, this value is not assigned by default to the items in that category.
 - ⋮ When you assign a new text attribute value for an item, it is, by default, added at the end of the existing text attribute values list. If the existing text attributes values list is more than one page, the newly added text attribute value is displayed as the last entry on the last page.
10. In the Attribute Management screen, click **Save**.

Note: * indicates that the field is mandatory.

A new free-form text value is assigned to the text attribute. You can modify the sequence of the attribute values by either clicking  or . However, rearranging the text attribute values is limited

to a single results page. For example, if the list of text attribute value exceeds one page, you cannot move a text attribute value from Page 1 to Page 2, or from Page 2 to Page 1.

Delete a Value from a Text Attribute

To delete a value from a text attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the tree in the **Item Attributes** panel, select the text attribute whose properties you want to delete.
4. The **Text Attribute Properties** panel is displayed. Select the check box corresponding to the value that you want to delete, and select **Delete** from the **More Actions** drop-down menu.
5. A message asking you for confirmation is displayed. Click **Yes** to delete the value.
The selected value is deleted from the text attribute.

Add Allowed Value Assets to a Text Attribute

Assets are electronic media objects that you associate with items, categories, attributes, and attribute values. Asset types can include images, video, audio, and text files. You can add an asset to an allowed value of a text attribute.

You can add an allowed value asset to a text attribute from the Attribute Management screen.

To add an allowed value asset to a text attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select the corresponding attribute.
4. The **Text Attribute Properties** panel is displayed. In the **Valid Values** panel, click the **Assets <number>** hyperlink.
5. The Manage Allowed Value Assets dialog box is displayed. Click **Add**.
6. The Add Asset dialog box is displayed. Perform the following steps:
 - a. In the **Asset ID*** box, enter a unique identifier (ID) for the asset.
 - b. In the **Short Description*** box, enter a brief description of the asset.
 - c. In the **Long Description** box, enter a detailed description of the asset.
 - d. From the **Server** drop-down list, select the server on which this asset type is located. The drop-down list is either populated by all the available server locations, or the codes that are configured in the Applications Manager.
 - e. From the **Type** drop-down list, select the asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - f. In the **File** box, enter the name of the file.
 - g. Click **Save**.

Note: * indicates that the field is mandatory.

An allowed value asset is added to the text attribute.

Modify Allowed Value Assets for a Text Attribute

You can choose to modify the short description and description of an asset. You can also modify the location of the server, asset type, and the name of the file in which the asset is created.

To modify an allowed value asset for a text attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select an attribute whose assets you want to manage.
4. The **Text Attribute Properties** panel is displayed. In the **Valid Values** panel, click the **Assets <number>** hyperlink.
5. The Manage Allowed Value Assets dialog box is displayed. Select the check box adjacent the asset you want to modify.
6. The **Asset Detail** area is displayed. Make the necessary modifications:
 - ⌵ In the **Short Description*** box, enter a new brief description of the asset.
 - ⌵ In the **Long Description** box, enter a new detailed description of the asset.
 - ⌵ From the **Server** drop-down list, select a new server on which this asset type is located.
 - ⌵ From the **Type** drop-down list, select a new asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - ⌵ In the **File** box, enter a new name of the file.
 - ⌵ Click **Save**.

Note: The **Asset ID** text box is displayed as read-only.

The allowed value asset is modified.

Delete Allowed Value Assets from a Text Attribute

You can delete an asset from an attribute if you do not want any of the electronic media objects to be associated with the attribute.

To delete an asset for an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select an attribute whose assets you want to manage.
4. The **Text Attribute Properties** panel is displayed. In the **Valid Values** panel, click the **Assets <number>** hyperlink.
5. The Manage Allowed Value Assets dialog box is displayed. Select the check box adjacent the asset you want to delete.
6. Click **Delete**.
7. A message asking you for confirmation is displayed. Click **Yes** to delete the asset.
The allowed value asset is deleted from the text attribute.

Define the Properties of a Boolean Attribute

You can define the properties of a Boolean attribute to create the default value to True or False from the Attribute Management screen.

You can manage the properties of a Boolean attribute only if you have selected the **Attribute with valid values** radio button, and the **Boolean Attribute** option from the **Value Type*** drop-down list in the **Manage Attribute Details** panel when creating an attribute.

To define the Boolean attribute properties:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select the corresponding attribute.
4. The **Boolean Attribute Details** panel is displayed. To create the default value to False, select the **Default to False** radio button, otherwise, select the **Default to True** radio button.

Note: If a value is made as the default value of an attribute and this attribute is assigned to a category, then the value is displayed by default in the corresponding field of the Attribute Management screen pertaining to the category. However, unless you click **Save**, this value is not assigned by default to the items in that category.

5. In the Attribute Management screen, click **Save**.

The properties for a Boolean attribute are defined.

Assign all the Numbers to a Number Attribute

You can assign all the numbers to a number attribute only if you have selected the **Attribute with valid values** radio button, and the **Number Attribute option** from the **Valut Type*** drop-down list in the **Manage Attribute Details** panel when creating an attribute.

You can assign all the numbers to a number attribute in decimal or integer format from the Attribute Management screen.

To assign all the numbers to a number attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select the corresponding attribute.
4. The **Number Attribute Properties** panel is displayed. Select the **Allow Decimal Values** check box to determine if decimal values should be allowed for this attribute.
5. Select the **All Numbers** radio button.
6. In the **Default Value** field, enter a default value. If you have already selected the **Allow assignment of multiple values** check box, enter multiple values separated by a semi colon if multiple default values are required.

Note: If a value is made as the default value of an attribute and this attribute is assigned to a category, then the value is displayed by default in the corresponding field of the Attribute Management screen pertaining to the category. However, unless you click **Save**, this value is not assigned by default to the items in that category.

7. Select the **Allow assignment of multiple values** check box to allow multiple default values when assigning the attribute to a category or an item.
8. Select the **This attribute must have an assigned value on the associated items** check box to make this attribute value mandatory.
9. Click **Save**.

All the numbers are assigned to the number attribute.

Assign Specific Numbers to a Number Attribute

You can assign specific numbers to a number attribute only if you have selected the **Attribute with valid values** radio button, and the **Number Attribute option** from the **Value Type*** drop-down list in the **Manage Attribute Details** panel when creating an attribute.

You can specify a a range of allowed numbers, such as 60-180, allow any number or a range of incremental values to a number attribute from the Attribute Management screen.

To assign specific numbers to a number attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select the corresponding attribute.
4. The **Number Attribute Properties** panel is displayed. Select the **Allow Decimal Values** check box to determine if decimal values should be allowed for this attribute.
5. Select the **Specific Numbers** radio button.
6. In the **Values*** box, enter values that are either separated by a semicolon, or number ranges with a dash (-). For example, you can either enter 2; 3; 4; 6; 9; 10; 11 or 2-6; 9-11.
7. In the **Increment By** box, enter an increment for the number range. For example, if you enter 10-20 in the **Values** box and enter an increment of 2, the resulting list of allowed values will be 10, 12, 14, 16, 18, and 20.
8. In the **Default Value** box, enter a default value. If you have already selected the **Allow assignment of multiple values** check box, you can also enter multiple values separated by a semicolon if multiple default values are required.
Note: If a value is made as the default value of an attribute and this attribute is assigned to a category, then the value is displayed by default in the corresponding field of the Attribute Management screen pertaining to the category. However, unless you click **Save**, this value is not assigned by default to the items in that category.
9. Select the **Allow assignment of multiple values** check box to allow multiple default values when assigning the attribute to a category or an item.
10. Select the **This attribute must have an assigned value on the associated items** check box to make this attribute value mandatory.
11. Click **Save**.

Note: * indicates that the field is mandatory.

Specific numbers are assigned to the number attribute.

View Derived Attributes

A derived attribute is an attribute whose value can be derived from the values of other attributes. You can derive values from only those attributes that have the number attribute format.

You can view derived attributes from the Attribute Management screen.

To view the derived attributes:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select the attribute.
4. In the **Related Tasks** panel, click **View Derived Attributes**. This related task is enabled only if you have selected the attribute that has derived attributes associated to it.

The **Derived Attributes** panel with a list of the derived attributes is displayed.

Define a Range for a Derived Attribute

You can define a range for a derived attribute so that the system displays an item within the defined range when searching for the item.



For example, you can define a range for the Size attribute of shirts as 32-36. Each shirt in the database is assigned to a particular size range. When a customer searches for a particular shirt size, the exact shirt size is mapped to the assigned range and all the shirts within the range are displayed. Thus, when the customer enters 32-inch as the search criteria for a shirt, all the shirts assigned in the range of 32-36 inch are displayed.

To define a range for a derived attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select the derived attribute whose range you want to define.
4. The **Derived Attribute Value Ranges** panel is displayed. Click **Add**.
5. Perform the following steps in the new row that is displayed.
 - a. Click the **From*** box, enter the start range.
 - b. Click the **To*** box, enter the end range.
 - c. Click the **Description*** box, enter a description for the range of the values. For example, if you enter 100 in the **From** panel and 250 in the **To** panel, you can enter 100-250, > 100, or 100 and up in the **Description** text box.

The new value is added at the end of the list. You cannot change the sequence of the values until it is saved.
6. In the Attribute Management screen, click **Save**.

Notes:



- ⌵ If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).
- ⌵ * indicates that the field is mandatory.

The range for the derived value is defined.

Modify the Sequence of a Derived Attribute Value Range

You can modify the sequence of derived attribute value ranges logically. The sequence of the derived attribute value ranges determines the sequence in which the ranges are displayed in Sterling Web application when a customer views the details of the corresponding item.

To modify the sequence of the derived attribute value ranges:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select the derived attribute whose range you want to define.
4. The **Derived Attribute Value Ranges** panel is displayed. Select the derived attribute value range whose sequence you want to change, and either click  to move it one position above the current position in the **Derived Attribute Value Ranges** panel, or click  to move it one position below the current position in the **Derived Attribute Value Ranges** panel.

The sequence of the derived attribute value range is modified.

Delete a Range from a Derived Attribute

To delete a range from a derived attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select the derived attribute whose range you want to define.
4. In the **Derived Attribute Value Ranges** panel, select the check box adjacent **From**, which corresponds to the value that you want to remove.
5. From the **More Actions** drop-down menu, select **Delete**.
6. A message asking you for confirmation is displayed. Click **Yes** to delete the value.
The range is deleted from the derived attribute.

Add a Postfix to an Attribute Value

A postfix is an operator that is appended to the assigned value of an attribute. For example, the Screen Size attribute can have a value of 26 inches. The numeral 26 is the number attribute value, and inches is the postfix.

You can add a postfix to the **Postfix** drop-down list in the **Manage Attribute Details** panel when creating an attribute or after creating an attribute.

To add a postfix:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select a number attribute whose postfix you want to manage.

The **Number Attribute Properties** panel is displayed.

4. In the **Related Tasks** panel, click **Attribute Details**.
5. The Attribute Details panel is displayed. Click **Manage Postfix**.
6. The Manage Post Fixes dialog box is displayed. Click **Add**.
7. The New Value dialog box is displayed. Perform the following steps:
 - a. In the **Value*** box, enter the identifier of the value.
 - b. In the **Short Description*** box, enter a brief description of the value.
 - c. In the **Description** box, enter a detailed description of the value.
 - d. Click **Save**.
8. In the Attribute Management screen, click **Save**.

Note: * indicates that the field is mandatory.

The new postfix is displayed in the **Postfix** drop-down list in the **Manage Attribute Details** panel.

Modify a Postfix for an Attribute Value

To modify a postfix of an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select a number attribute whose postfix you want to manage.
The **Number Attribute Properties** panel is displayed.
4. In the **Related Tasks** panel, click **Attribute Details**.
5. The Attribute Details panel is displayed. Click **Manage Postfix**.
6. The Manage Post Fixes dialog box is displayed. Make the necessary modifications in the row containing the details of the postfix:
 - ⋮ Click the **Short Description*** box, modify the brief description of the postfix.
 - ⋮ Click the **Description** box, modify the detailed description of the postfix.
7. In the Attribute Management screen, click **Save**.

Note: * indicates that the field is mandatory.

The details of the postfix are modified.

Remove a Postfix

You can remove a postfix from the **Postfix** drop-down list in the **Manage Attribute Details** panel.

To remove a postfix:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select a number attribute whose postfix you want to manage.
The **Number Attribute Properties** panel is displayed.
4. In the **Related Tasks** panel, click **Attribute Details**.
5. The Attribute Details panel is displayed. Click **Manage Postfix**.
6. The Manage Post Fixes dialog box is displayed. Select the check box adjacent the postfix that you want to delete and click **Remove**.
7. A message asking you for confirmation is displayed. Click **Yes** to remove the postfix.
The postfix is removed from the **Postfix** drop-down list in the **Manage Attribute Details** panel.

Add an Asset to an Attribute

Assets are electronic media objects that you associate with items, categories, attributes, and attribute values. Asset types include images, video, audio, and text files.

You must specify the content location for each of the assets. Typically, assets are digitally-based objects that reside on external systems. For example, you can assign an image file to a category that is available from an online catalog so that online customers can view an image that represents this category. In such a scenario, you must provide a content location for the image file. Content location is the path that identifies the location of the image file.

You can add an asset to an attribute only if you have either selected the **Attribute with valid values** radio button or the **Refers to an item field** radio button in the **Manage Attribute Details** panel when creating an attribute.

You can add an asset to an attribute from the Attribute Management screen.

To add an asset to an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select an attribute whose assets you want to manage.
4. The **Attribute Details** panel is displayed. In the **Related Tasks** panel, click **Manage Assets**.
5. The **Attribute Assets** panel is displayed. Click **Add**.
6. The Asset Detail dialog box is displayed. Perform the following steps:
 - a. In the **Asset ID*** box, enter a unique identifier (ID) for the asset.
 - b. In the **Short Description*** box, enter a brief description of the asset.
 - c. In the **Long Description** box, enter a detailed description of the asset.
 - d. From the **Server** drop-down list, select the server on which this asset type is located. The drop-down list is either populated by all the available server locations, or the codes that are configured in the Applications Manager.
 - e. From the **Type** drop-down list, select the asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - f. In the **File** box, enter the name of the file.
 - g. Click **Save**.
7. In the Attribute Management screen, click **Save**.

Note: * indicates that the field is mandatory.

A new asset is added to the selected attribute.

Modify an Asset for an Attribute

You can choose to modify the short description and description of an asset. You can also modify the location of the server, asset type, and the name of the file in which the asset is created.

To modify an asset for an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select an attribute whose assets you want to manage.
4. The **Attribute Details** panel is displayed. In the **Related Tasks** panel, click **Manage Assets**.
5. The **Attribute Assets** panel is displayed. Select the check box adjacent the asset you want to modify.
6. The **Asset Detail** area is displayed. Make the necessary modifications:
 - In the **Short Description*** box, enter a new brief description of the asset.
 - In the **Long Description** box, enter a new detailed description of the asset.
 - From the **Server** drop-down list, select a new server on which this asset type is located.
 - From the **Type** drop-down list, select a new asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - In the **File** box, enter a new name of the file.
 - Click **Save**.

Note: The **Asset ID** text box is displayed as read-only.

7. In the Attribute Management screen, click **Save**.

The asset is modified.

Delete an Asset from an Attribute

You can delete an asset from an attribute if you do not want any of the electronic media objects to be associated with the attribute.

To delete an asset for an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the **Item Attributes** tree, select an attribute whose assets you want to delete.
4. The **Attribute Details** panel is displayed. In the **Related Tasks** panel, click **Manage Assets**.
5. The **Attribute Assets** panel is displayed. Select the check box adjacent the asset you want to delete.
6. Click **Delete**.
7. A message asking you for confirmation is displayed. Click **Yes** to delete the asset.
The asset is deleted from the corresponding attribute.

Delete an Attribute

Before deleting an attribute, ensure it is not assigned to any item or category. Otherwise, the details of the attributes will not be displayed correctly in the application and Sterling Web application.

To delete an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the tree in the **Item Attributes** panel, select the attribute that you want to delete.
4. The **Manage Attribute Details** panel is displayed. Click **Delete**.
5. A message asking you for confirmation is displayed. Click **Yes** to delete the attribute.

The attribute is deleted, and the **Attribute Group Details** panel pertaining to the attribute group to which the deleted attribute belonged is displayed.

Delete an Attribute Group

Before deleting an attribute group, ensure that the attributes of this attribute group are not assigned to any item or category. Otherwise, the details of the assigned attributes will not be displayed correctly in Sterling Business Center and Sterling Web application.

To delete an attribute group:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Attributes**. Alternatively, click the **Manage Attributes** hyperlink in the home page.
3. The Attribute Management screen is displayed. From the tree in the **Item Attributes** tree, select the attribute group that you want to delete.
4. The **Attribute Group Details** panel is populated with the details of the selected attribute group. Click **Delete**.
5. A message asking you for confirmation is displayed. Click **Yes** to delete the attribute group.

The selected attribute group containing all the child groups and attributes is deleted, and the details of the parent attribute group are displayed in the **Attribute Group Details** panel. If the attribute group does not have a parent attribute group, the details of the attribute domain are displayed in the **Attribute Domain Details** panel.

Add an Organization to a Subcatalog Organization List

A subcatalog organization is an enterprise that is authorized by a catalog organization to manage one or more categories within the master catalog, and define the catalog entitlements that grant or restrict other organization's access to categories within the master catalog. A subcatalog organization can either be a vendor enterprise or a seller enterprise. Subcatalog organizations can perform the following functions:

- ▬ Manage the categories that have been assigned to the subcatalog organizations within the master catalog
- ▬ Manage the items that have been assigned to the subcatalog organizations within the categories in the master catalog
- ▬ Assign catalog organization attributes to categories
- ▬ Assign items from the master catalog to the subcatalog organization's categories.

You can only add organizations to a subcatalog organization list that are already configured in the Applications Manager.

You can add an organization as a subcatalog organization from the Subcatalog Organizations screen.

To add an organization as a subcatalog organization:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Subcatalog Organizations**. Alternatively, click the **Manage Subcatalog Organizations** hyperlink in the home page.
3. The Subcatalog Organizations screen is displayed. Click **Add**.
4. The Basic Organization Search dialog box is displayed. Perform the following steps:
 - a. Enter the search criteria, and click **Search**.
 - b. A list of organizations is displayed. Select the check box adjacent the corresponding organization code.
 - c. Click **Save**.

The selected organization is added as a subcatalog organization.

Remove an Organization from a Subcatalog Organization List

You can remove an organization if you do not want to use this organization as a subcatalog organization anymore.

You can remove a subcatalog organization from the Subcatalog Organizations screen.

To remove an organization from a subcatalog organization list:



1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Subcatalog Organizations**. Alternatively, click the **Manage Subcatalog Organizations** hyperlink in the home page.
3. The Subcatalog Organizations screen is displayed. Select the check box adjacent the subcatalog organization you want to remove.
4. Click **Remove**.
5. A message asking for your confirmation is displayed. Click **Yes** to remove the subcatalog organization.
The organization is removed from the subcatalog organization list.

Create a Customer Entitlement

You can create a customer entitlement to enable enterprises to define the items their customers can purchase. For example, an enterprise may restrict a customer from buying items under its Apparel category, but allow the customer to buy items under its Electronics category.

You can create a customer entitlement from the Customer Entitlement screen.

To create a customer entitlement:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **New Customer Entitlement**. Alternatively, in the home page, click the **New Entitlement** hyperlink under **Customer Entitlements**.
3. The **Entitlement Detail** panel is displayed. Perform the following steps:
 - a. In the **Entitlement ID*** box, enter a unique identifier (ID) of the entitlement. This identifier cannot be modified after it has been defined, and can be used as a search criteria.
Note: Customer entitlements and seller entitlements cannot share the same identifier. For example, if you enter ABC in the **Entitlement ID*** box pertaining to a customer entitlement, and if a seller entitlement with ABC as the Entitlement ID exists, an error message is displayed.
 - b. In the **Description*** box, enter a brief description about the entitlement. This description can be used as a search criteria.
 - c. In the **Effective Start Date** box, enter the start date. Alternatively, click  to select the start date. The start date indicates the date from which the entitlement becomes effective.
 - d. In the **Effective End Date** box, enter the end date. Alternatively, click  to select the end date. The end date indicates the date until which the entitlement is effective.
4. In the Customer Entitlement screen, click **Save**.

Note: * indicates that the field is mandatory.

A new entitlement is created. You can now create rules and associate customers to the entitlement by performing the following tasks:

- ⋮ Specify rules for enforcing the customer entitlement.
- ⋮ Specify items that are assigned to customers.
- ⋮ Assign customers to the customer entitlement.

Search for a Customer Entitlement

You can search for a customer entitlement and view its details using either of the following options:

- **Basic Search:** This type of search enables you to perform a quick search by specifying basic criteria such as the complete or partial identifier of the customer entitlement, or the complete or partial description of the entitlement.
- **Advanced Search:** This type of search enables you to perform a search based on the criteria that you had selected. You can select the criteria and the corresponding operator, and then select or specify the corresponding values.

You can search for a customer entitlement from the Customer Entitlement Search screen.

Basic Entitlement Search

To perform a basic entitlement search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Entitlement Search screen is displayed. In the **Entitlement ID Contains** text box, enter the complete or partial identifier of the entitlement you want to search for.
4. In the **Entitlement Description Contains** box, enter the complete or partial description of the entitlement you want to search for.
5. Select the **Only include entitlements for which today is within the effective date range** check box to include the entitlements for which the current date belongs to the effective range.
6. Click **Search**.

The entitlements matching the search criteria are displayed. However, if there is only one customer entitlement matching the search criteria, the Customer Entitlement screen is displayed.

Note: If the administration organization is not an entitlement organization, the entitlements that are available for the entitlement organization of the administration organization are displayed.

Advanced Entitlement Search

To perform an advanced entitlement search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Entitlement Search screen is displayed. Click **Advanced Search**.
4. The **Advanced Entitlement Search** panel is displayed. From the **Select Criteria** drop-down list, select the criteria that you want to include in the search. For example, to search for an entitlement by status, select **Status** from the **Select Criteria** drop-down list.

5. From the **Operator** drop-down list, select the operator that you want to use for the search criteria.

In the corresponding field, enter or select the appropriate value. The fields are displayed based on the operator that you have selected. For example, if you select **Effective Start Date** from the **Select Criteria** drop-down list, and **Between** from the **Operator** drop-down list, two fields in which you can enter or select the appropriate dates, are displayed.

Note: It is mandatory that you select or enter at least one search criteria and a corresponding value. If you select or enter more than one search criteria, the search will return the entitlements that match all the criteria.

6. Click **Search**.

The entitlements matching the search criteria are displayed. However, if there is only one customer entitlement matching the search criteria, the Customer Entitlement screen is displayed.

Note: If the administration organization is not an entitlement organization, the entitlements that are available for the entitlement organization of the administration organization are displayed.

Add More Search Criteria

You can include additional search criteria to perform a more detailed search and narrow down the search results.

To include additional search criteria:

1. In the Advanced Entitlement Search screen, click **Add More Criteria**.
2. A new row for specifying additional search criteria is displayed. Enter the appropriate search criteria, and click **Search**.

The entitlements matching the search criteria are displayed. However, if there is only one customer entitlement matching the search criteria, the Customer Entitlement screen is displayed.

Note: If the administration organization is not an entitlement organization, the entitlements that are available for the entitlement organization of the administration organization are displayed.

Create a Customer Entitlement Rule

You can create a customer entitlement rule to either include or exclude items that are assigned to customers under customer entitlements. For example, you can create an item entitlement rule such that customers can buy all the items under the Electronic category, excluding items with 240 volts. Therefore, if there are 100 items within the Electronic category, and 20 of them have the 240 volts value assigned as the voltage attribute, only the remaining 80 items will be available to the customer.

You can create entitlement rules to either include or exclude items, based on the following parameters:

- **Category** - This indicates that all the items under a particular category are applied.
- **Attribute Values** - This indicates that all the items with the assigned attribute value are applied.
- **List of Items**- This indicates that all the items within a specific list of items are applied.





Note: Ensure that the customer entitlement of a ship-together Bundle item is the same for both the parent and component items in the bundle.



You can create a customer entitlement rule from the Customer Entitlement screen.


To create a customer entitlement rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Customer Entitlement Search screen is displayed. Enter the search criteria, and click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlements** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement for which you want to manage a rule. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. In the **Create Entitlement Item List By** area that is displayed, select either of the following radio buttons adjacent the **all items** box:
 - ⌚ **Including** - Select this radio button to create the rule including all the items in the corresponding catalog.
 - ⌚ **Excluding** - Select this radio button to create the rule excluding all the items in the corresponding catalog.
6. In the **Then Apply The Following Criteria** area, define a rule as described in the following table:

Field	Description
Text box*	Enter a sequence number for the rule. Note: Ensure that you specify a unique sequence for the rules.
Radio button	Select either of the following radio buttons: <ul style="list-style-type: none">◆ Include - Select this radio button to include the items in the entitlement.◆ Exclude - Select this radio button to exclude the items in the entitlement.

Field	Description
all item(s) that	<p>Select one of the following radio buttons:</p> <ul style="list-style-type: none"> ◆ are associated with the category - Select this radio button to either include or exclude all the items that are associated with a certain category in the entitlement. Click  to search for a category to which the items are associated. The Tree panel is displayed. Select the required category and click Select. The selected category is displayed in the box. ◆ are part of the list of - Select this radio button to either include or exclude specific items in the entitlement. The Items panel is displayed. Click Add Items to add Item IDs corresponding to items that you want to either include or exclude from the entitlement. The Basic Item Search dialog box is displayed. Enter the search criteria, and click Search. Alternatively, use either the Basic Search or the Advanced Search option to narrow down the list of entitlements displayed. In the Items panel that is displayed, select the check box adjacent to the Item ID that you want to add, and click Select. The selected Item IDs are added to the list in the Items panel. To remove an item from the Items panel list, select the check box adjacent the Item ID you want to remove, and click Remove. <ul style="list-style-type: none"> Note: If you have added more than 15 items to the Items panel list, a View More link is displayed. Click the View More link to view the complete list of items in the Entitlement Rule Detail Items dialog box. ◆ To add an item, click Add. In the Item Search dialog box that is displayed, enter the search criteria and click Search. A list of items that matches the search criteria is displayed. Select the item that you want to add to the list, and click Save. The new item (or items) is added to the list. ◆ To remove an item from the list, select the check box adjacent the Item ID you want to remove, and click Remove. Alternatively, you can use the Find item(s) box to filter the list of items listed in Entitlement Rule Detail Items dialog box. Enter the complete or partial identifier of the item you want to remove, and click . Note that the partial identifier is of "Starts With" type. The list of the items matching the search criteria is displayed. Select the item you want to remove, and click Remove. ◆ have the attribute - Select this radio button to either include or exclude all the items that have a specific value for the item attribute that you select, in the entitlement. A look up widget is displayed. Click  to search for an item attribute. The Attribute Search panel is displayed. Select the required attribute. In the Specify Value For area, you can perform the following to assign an attribute value depending on the data type: <ul style="list-style-type: none"> - If it is a text data type, enter the new value in the respective field. Note: When the number of allowed values defined for a text attribute is less than or equal to 30, a drop-down list is displayed. If the number of text attribute value exceeds 30, the drop-down list is replaced by a text box with a search icon. You can use this search icon to search for a text attribute value. When you click the search icon, the Allowed Values Search dialog box is displayed. Enter the text attribute value or the text attribute value description to search for a text attribute value, and click Search. A list of allowed values that matches your search criteria is displayed. Select the required text attribute value, and click Select. Use  adjacent to the search icon to clear the existing text attribute value.

Field	Description
	<ul style="list-style-type: none"> - If it is a Boolean data type, select or clear the respective check box. - If it is a number data type, enter the new value in the respective field. - If the multiple values are allowed for the attribute, click the Modify hyperlink. In the Select Multi Attribute Values dialog box that is displayed, perform the following: <ol style="list-style-type: none"> i. Click  to add another value. ii. From the drop-down list that is displayed, select the required value. iii. To add multiple values, repeat step i through step ii. iv. Click Select. <p>The selected values are displayed in the Values box in the Specify Value For area</p> <p>Tip: To remove a value, click  adjacent the respective value.</p> <p>Note: Although there are three basic data types, the way each of these is displayed depends on how the attributes are configured in the Attribute Management. Example - for a number data type, the values may be listed as a drop-down list, instead of a text box.</p> <p>Click Select. The selected attribute and its value are displayed in the row containing the rule.</p>

7. To add another rule, click .
8. A new row is added. Repeat step 2 to define the rule.
9. In the Customer Entitlement screen, click **Save**.

Note: * indicates that the field is mandatory.





A rule or list of rules is created.



Modify a Customer Entitlement Rule

To modify a customer entitlement rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Customer Entitlement Search screen is displayed. Enter the search criteria, and click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlements** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement for which you want to manage a rule. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. In the **Create Entitlement Item List By** area, select either of the following radio buttons adjacent the **all items** box:
 - **Including** - Select this radio button to create the rule including all the items in the corresponding catalog.
 - **Excluding** - Select this radio button to create the rule excluding all the items in the corresponding catalog.
6. In the **Then Apply The Following Criteria** area, make the necessary modifications:

Field	Description
Text box	Enter a new sequence number for the rule. Note: Ensure that you specify a unique sequence for the rules.
Radio button	Select either of the following radio buttons: <ul style="list-style-type: none">▪ Include - Select this radio button to include the items in the entitlement.▪ Exclude - Select this radio button to exclude the items in the entitlement.


Field	Description
all item(s) that	<p>Select one of the following radio buttons:</p> <ul style="list-style-type: none"> ▪ are associated with the category - Select this radio button to either include or exclude all the items that are associated with a certain category in the entitlement. Click  to search for a category to which the items are associated. The Tree panel is displayed. Select the required category and click Select. The selected category is displayed in the box. ▪ are part of the list of - Select this radio button to either include or exclude specific items in the entitlement. The Items panel is displayed. Click Add Items to add Item IDs corresponding to items that you want to either include or exclude from the entitlement. The Basic Item Search dialog box is displayed. Enter the search criteria, and click Search. Alternatively, use either the Basic Search or the Advanced Search option to narrow down the list of entitlements displayed. In the Items panel that is displayed, select the check box adjacent to the Item ID that you want to add, and click Select. The selected Item IDs are added to the list in the Items panel. To remove an item from the Items panel list, select the check box adjacent the Item ID you want to remove, and click Remove. <ul style="list-style-type: none"> Note: If you have added more than 15 items to the Items panel list, a View More link is displayed. Click the View More link to view the complete list of items in the Entitlement Rule Detail Items dialog box. ◆ To add an item, click Add. In the Item Search dialog box that is displayed, enter the search criteria and click Search. A list of items that matches the search criteria is displayed. Select the item that you want to add to the list, and click Save. The new item (or items) is added to the list. ◆ To remove an item from the list, select the check box adjacent the Item ID you want to remove, and click Remove. Alternatively, you can use the Find item(s) box to filter the list of items listed in Entitlement Rule Detail Items dialog box. Enter the complete or partial identifier of the item you want to remove, and click . Note that the partial identifier is of "Starts With" type. The list of the items matching the search criteria is displayed. Select the item you want to remove, and click Remove. ▪ have the attribute - Select this radio button to either include or exclude all the items that have a specific value for the item attribute that you select, in the entitlement. A look up widget is displayed. Click  to search for an item attribute. The Attribute Search panel is displayed. Select the required attribute. In the Specify Value For area, you can perform the following to assign an attribute value depending on the data type: <ul style="list-style-type: none"> - If it is a text data type, enter the new value in the respective field. Note: When the number of allowed values defined for a text attribute is less than or equal to 30, a drop-down list is displayed. If the number of text attribute value exceeds 30, the drop-down list is replaced by a text box with a search icon. You can use this search icon to search for a text attribute value. When you click the search icon, the Allowed Values Search dialog box is displayed. Enter the text attribute value or the text attribute value description to search for a text attribute value, and click Search. A list of allowed values that matches your search criteria is displayed. Select the required text attribute value, and click Select. Use  adjacent to the search icon to clear the existing text attribute value.

Field	Description
	<ul style="list-style-type: none"> - If it is a Boolean data type, select or clear the respective check box. - If it is a number data type, enter the new value in the respective field. - If the multiple values are allowed for the attribute, click the Modify hyperlink. In the Select Multi Attribute Values dialog box that is displayed, perform the following: <ol style="list-style-type: none"> i. Click  to add another value. ii. From the drop-down list that is displayed, select the required value. iii. To add multiple values, repeat step i through step ii. iv. Click Select. <p>The selected values are displayed in the Values box in the Specify Value For area.</p> <p>Tip: To remove a value, click  adjacent the respective value.</p> <p>Note: Although there are three basic data types, the way each of these is displayed depends on how the attributes are configured in the Attribute Management. Example - for a number data type, the values may be listed as a drop-down list, instead of a text box.</p> <p>Click Select. The selected attribute and its value are displayed in the row containing the rule.</p>

7. In the Customer Entitlement screen, click **Save**.
The customer entitlement rule is modified.

Remove a Customer Entitlement Rule

To remove a customer entitlement rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Customer Entitlement Search screen is displayed. Enter the search criteria, and click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlements** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement for which you want to manage a rule. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. In the **Then Apply The Following Criteria** area, click  adjacent the rule you want to remove from the customer entitlement.
6. A message asking for your confirmation is displayed. Click **Yes** to remove the rule.
7. In the Customer Entitlement screen, click **Save**.
The rule is removed from the customer entitlement.

Associate a Generic Customer Group to a Customer Entitlement

You can associate a generic customer group to a customer entitlement so that the customer group can access the items that are assigned to them in the customer entitlement. The following customers can be associated to a customer entitlement:

- Anonymous Customers
- Business Customers
- Consumer Customers

You can associate a generic customer group to a customer entitlement from the Customer Entitlement screen.

To associate a generic customer group for a customer entitlement:

1. Log in to Sterling Business Center as an administrator.
 2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
 3. The Customer Entitlement Search screen is displayed. Enter the search criteria, and click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
 4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement to which you want to associate a generic customer group. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
 5. The **Entitlement Detail** panel is displayed. Click the **Customers Assignments** tab.
 6. In the **Customer Assignments** area, click the **Generic Assignments** tab.
 7. In the **Generic Assignments** area that is displayed, select one of the following radio buttons:
 - **This entitlement is applicable for all customers** - Select this to assign the entitlement to all the customers.
 - **This entitlement is applicable to the following customers** - Select this to assign the entitlement to only certain customers, and select the following check boxes.
 - **Anonymous Users** - Select this to assign the entitlement to anonymous users. An anonymous user is a user who browses the Sterling Web without logging in. An anonymous user can add items to a cart without logging in to Sterling Web. If you select this check box, the anonymous users will see the prices defined in the price list when they browse the product catalog.
 - **All consumer customers**- Select this to assign the entitlement to all the consumers.
 - **All business customers** - Select this to assign the entitlement to all the business customers.
- Note:** The **This entitlement is applicable to the following customers** radio button and the check boxes in the corresponding area are disabled, if you have selected either the **This entitlement is not assigned to any customer** radio button or the **This entitlement is applicable for all customers** radio button in the **Generic Assignments** area.

8. In the Customer Entitlement area, click **Save**.

The generic customer group is associated to the corresponding customer entitlement.

Define a Customer Entitlement Without a Customer

A customer entitlement can be defined without a customer so that the items in the customer entitlement are not accessed by anyone.

You can define a customer entitlement without a customer from the Customer Entitlement screen.

To define a customer entitlement without a customer:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Customer Entitlement Search screen is displayed. Enter the search criteria, and click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement from which you want to dissociate a generic customer group. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. The Entitlement Details screen is displayed. Click the **Customers Assignments** tab.
6. In the **Customer Assignments** area, click the **Generic Assignments** tab.
7. In the **Generic Assignments** area that is displayed, select the **This entitlement is not assigned to any customer** radio button. This radio button is selected by default when a customer entitlement rule is created.
8. In the Customer Entitlement screen, click **Save**.

The corresponding customer entitlement is defined without a customer.

Add a Customer Profile Criteria to a Customer Entitlement


You can assign an entitlement to a set of customers that have specific profile attributes. A customer profile is a set of data, which can be used as a criteria in order to associate the business customers to a customer entitlement. You can add a customer profile criteria so that the business customers belonging to the defined customer profile criteria can access the items in the customer entitlement. For example, you can assign an entitlement to all the customers that belong to the same region.

You can add a customer profile criteria to a customer entitlement from the Customer Entitlement screen.

To add a customer profile criteria to a customer entitlement:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Customer Entitlement Search screen is displayed. Enter the search criteria, and click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement to which you want to add a customer profile criteria. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. The **Entitlement Detail** panel is displayed. Click the **Customers Assignments** tab.
6. In the **Customers Assignments** area, click the **Customer Profile Assignments** tab.

Notes:

- The **Customer Profile Assignments** tab is disabled, if you have selected either the **This entitlement is not assigned to any customer** radio button or the **This entitlement is applicable for all customers** radio button.
 - The **Customer Profile Assignments** tab is disabled, if you have selected both the **All consumer customers** check box and the **All business customers** check box under the **This entitlement is applicable to the following customers** area.
7. In the **Customer Profile Assignments** area that is displayed, click **Add**.
 8. The Customer Rule dialog box is displayed. Perform the following steps:
 - a. From the **Vertical** drop-down list, select the customer's vertical market, for example, Education, Government, and so on.
 - b. From the **Relationship Type** drop-down list, select the relationship type of the customer, for example, Reseller, Retailer, Distributor, and so on. The relationship type indicates the type of relationship the customer has with the enterprise.
 - c. From the **Membership Level** drop-down list, select the customer's membership level, for example, Gold, Silver, Platinum, and so on.
 - d. In the **Region** field, click . The Regions dialog box is displayed. Select the appropriate region.

Note: It is mandatory that you select at least one criteria.

9. In the Customer Entitlement screen, click **Save**.


The defined customer profile criteria is displayed in the **Customer Profile Assignments** area. The business customers falling in this criteria are automatically associated to the corresponding customer entitlement.

Modify Customer Profile Criteria for a Customer Entitlement

To modify a customer profile criteria for a customer entitlement:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Customer Entitlement Search screen is displayed. Enter the search criteria, and click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement for which you want to manage a customer profile. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. The **Entitlement Detail** panel is displayed. Click the **Customers Assignments** tab.
6. In the **Customers Assignments** area, click the **Customer Profile Assignments** tab.

Notes:

- The **Customer Profile Assignments** tab is disabled, if you have selected either the **This entitlement is not assigned to any customer** radio button or the **This entitlement is applicable for all customers** radio button.
 - The **Customer Profile Assignments** tab is disabled, if you have selected both the **All consumer customers** check box and the **All business customers** check box under the **This entitlement is applicable to the following customers** area.
7. In the **Customer Profile Assignments** area, select the check box adjacent the customer profile criteria that you want to modify.
 8. Click **Modify**.
 9. The Customer Rule dialog box is displayed. Make the necessary modifications:
 - From the **Vertical** drop-down list, select a new vertical for a customer.
 - From the **Relationship Type** drop-down list, select a new relation type for a customer.
 - From the **Membership Level** drop-down list, select a new membership level.
 - Click  adjacent the **Region** box to search for a new region to which a customer must belong.
 - Click **Save**.
 10. In the Customer Entitlement screen, click **Save**.

The customer profile criteria is modified.

Remove Customer Profile Criteria from a Customer Entitlement

To remove customer profile criteria from a customer entitlement:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Customer Entitlement Search screen is displayed. Enter the search criteria, and click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement from which you want to remove customer profile criteria. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. The **Entitlement Detail** panel is displayed. Click the **Customers Assignments** tab.
6. In the **Customers Assignments** area, click the **Customer Profile Assignments** tab.

Notes:

- The **Customer Profile Assignments** tab is disabled, if you have selected either the **This entitlement is not assigned to any customer** radio button or the **This entitlement is applicable for all customers** radio button.
 - The **Customer Profile Assignments** tab is disabled, if you have selected both the **All consumer customers** check box and the **All business customers** check box under the **This entitlement is applicable to the following customers** area.
7. In the **Customer Profile Assignments** area that is displayed, select the check box adjacent the customer profile criteria you want to remove.
 8. Click **Remove**.
 9. A message asking you for confirmation is displayed. Click **Yes** to remove the customer profile criteria. The customer profile criteria is removed from the customer entitlement.

Associate a Specific Customer to a Customer Entitlement

You can manage a specific customer for a customer entitlement so that the specific business customers can access the items in the customer entitlement.

You can associate a specific customer to a customer entitlement from the Customer Entitlement screen.

To add a specific customer for a customer entitlement:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Customer Entitlement Search screen is displayed. Enter the search criteria, and click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement to which you want to associate a specific customer. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. The **Entitlement Detail** panel is displayed. Click the **Customer Assignments** tab.
6. In the **Customer Assignments** area, click the **Specific Assignments** tab.

Notes:

- The **Specific Assignments** tab is disabled, if you have selected either the **This entitlement is not assigned to any customer** radio button or the **This entitlement is applicable for all customers** radio button.
 - The **Specific Assignments** tab is disabled, if you have selected the **All business customers** check box or both the **All consumer customers** check box and the **All business customers** check box under the **This entitlement is applicable to the following customers** area.
7. In the **Specific Assignments** area that is displayed, click **Add**.
 8. The Customer Search dialog box is displayed. Perform any of the following steps that is applicable to search for a customer:
 - a. In the **E-mail Starts With** box, enter either the complete or partial E-mail ID of the customer.
 - b. In the **Last Name** box, enter the customer's last name.
 - c. In the **Day Phone #** box, enter the customer's day phone number. Ensure that you do not enter space or special characters when entering the phone number. Otherwise, customers matching the search criteria are not displayed in the **Customer List** panel.
 - d. In the **First Name** box, enter the customer's first name.
 - e. In the **Customer ID** box, enter the unique identifier (ID) of the customer.
 - f. In the **Zip Code** box, enter the zip code of the city to which the customer belongs.
 - g. Click **Search**.
 - h. The IDs and names of the customers whose details match the search criteria are displayed in the **Customer List** panel. Select the check box adjacent the **Customer ID** corresponding to the

customer you want to associate. To associate multiple customers, select the check boxes adjacent the customers that you want to associate.

i. Click **Select**.

9. In the Customer Entitlement screen, click **Save**.

The selected customer is associated to the customer entitlement.

Dissociate a Specific Customer from a Customer Entitlement

To dissociate a specific customer from a customer entitlement:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Customer Entitlement Search screen is displayed. Enter the search criteria, and click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement from which you want to dissociate a specific customer. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. The **Entitlement Detail** panel is displayed. Click the **Customer Assignments** tab.
6. In the **Customer Assignments** area, click the **Specific Assignments** tab.

Notes:

- The **Specific Assignments** tab is disabled, if you have selected either the **This entitlement is not assigned to any customer** radio button or the **This entitlement is applicable for all customers** radio button.
 - The **Specific Assignments** tab is disabled, if you have selected the **All business customers** check box or both the **All consumer customers** check box and the **All business customers** check box under the **This entitlement is applicable to the following customers** area.
7. In the **Specific Assignments** area that is displayed, select the check box adjacent the **Customer ID** corresponding to the customer you want to dissociate from the customer entitlement.
 8. Click **Remove**.
 9. A message asking you for confirmation is displayed. Click **Yes** to dissociate the specific customer. The specific customer is dissociated from the corresponding customer entitlement.

Delete a Customer Entitlement

When you delete a customer entitlement, all the rules that are created for a customer in a customer entitlement are not valid anymore.

To delete a customer entitlement:



1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Customer Entitlement**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Customer Entitlements**.
3. The Customer Entitlement Search screen is displayed. Enter the search criteria, and click **Search** to view a list of all the available entitlements. Alternatively, use the **Basic Search** or the **Advanced Search** to narrow down the list of entitlements displayed.
4. The search results are displayed in the Entitlement panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement you want to delete. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. The **Entitlement Detail** panel is displayed. Click **Delete**.
6. A message asking for your confirmation is displayed. Click **Yes** to delete the customer entitlement. The entitlement is deleted.

Create a Seller Entitlement

You can create a seller entitlement for an enterprise to manage other organizations' access to the categories in the corresponding catalog. The enterprise can allow one organization to manage a category in a catalog while restricting another organization from viewing the same category.

You can create a seller entitlement from the Seller Entitlement screen.

To create a seller entitlement:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Create Seller Entitlements**. Alternatively, in the home page, click the **New Entitlement** hyperlink under **Seller Entitlements**.
3. The **Entitlement Detail** panel is displayed. Perform the following steps:
 - a. In the **Entitlement ID*** box, enter a unique identifier (ID) of the entitlement. This identifier cannot be modified after it has been defined, and can be used as a search criteria.
Note: Seller entitlements and customer entitlements cannot share the same identifier. For example, if you enter ABC in the **Entitlement ID*** box pertaining to a seller entitlement, and if a customer entitlement with ABC as the Entitlement ID exists, an error message is displayed.
 - b. In the **Description*** text box, enter a brief description of the entitlement. This description can be used as a search criteria.
 - c. In the **Effective Start Date** box, enter the start date. Alternatively, click  to select the start date. The start date indicates the date from which the entitlement becomes effective.
 - d. In the **Effective End Date** box, enter the end date. Alternatively, click  to select the end date. The end date indicates the date until which the entitlement is effective.
4. In the Seller Entitlement screen, click **Save**.

Note: * indicates that the field is mandatory.

A new seller entitlement is created, and you can now create rules and associate organizations to the entitlement.

Search for a Seller Entitlement

You can search for a seller entitlement and view its details using either of the following options:

- **Basic Search:** This type of search enables you to perform a quick search by specifying basic criteria such as the complete or partial identifier of the seller entitlement, or the complete or partial description of the seller entitlement.
- **Advanced Search:** This type of search enables you to perform a search based on the criteria that you had selected. You can select the criteria and the corresponding operator, and then select or specify the corresponding values.

You can search for a seller entitlement from the Seller Entitlement Search screen.

Basic Entitlement Search

To perform a basic entitlement search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Seller Entitlements**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Seller Entitlements**.
3. The Entitlement Search screen is displayed. In the **Entitlement ID Contains** text box, enter the complete or partial identifier of the entitlement you want to search for.
4. In the **Entitlement Description Contains** text box, enter the complete or partial description of the entitlement you want to search for.
5. Select the **Only include entitlements for which today is within the effective date range** check box to include the entitlements for which the current date belongs to the effective range.
6. Click **Search**.

The entitlements matching the search criteria are displayed. However, if there is only one seller entitlement matching the search criteria, the Seller Entitlement screen is displayed.

Note: If the administration organization is not an entitlement organization, the entitlements that are available for the entitlement organization of the administration organization are displayed.

Advanced Entitlement Search

To perform an advanced entitlement search:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Seller Entitlements**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Seller Entitlements**.
3. The Entitlement Search screen is displayed. Click **Advanced Search**.
4. The **Advanced Entitlement Search** panel is displayed. From the **Select Criteria** drop-down list, select the criteria that you want to include in the search. For example, to search for an entitlement by status, select **Status** from the **Select Criteria** drop-down list.

5. From the **Operator** drop-down list, select the operator that you want to use for the search criteria.

In the corresponding field, enter or select the appropriate value. The fields are displayed based on the operator that you have selected. For example, if you select **Effective Start Date** from the **Select Criteria** drop-down list, and **Between** from the **Operator** drop-down list, two fields in which you can enter or select the appropriate dates, are displayed.

Note: It is mandatory that you select or enter at least one search criteria and a corresponding value. If you select or enter more than one search criteria, the search will return the entitlements that match all the criteria.

6. Click **Search**.

The entitlements matching the search criteria are displayed. However, if there is only one seller entitlement matching the search criteria, the Seller Entitlement screen is displayed.

Note: If the administration organization is not an entitlement organization, the entitlements that are available for the entitlement organization of the administration organization are displayed.

Add More Search Criteria

You can include additional search criteria to perform a more detailed search and narrow down the search results.

To include additional search criteria:

1. In the Advanced Entitlement Search screen, click **Add More Criteria**.
2. A new row for specifying additional search criteria is displayed. Enter the appropriate search criteria, and click **Search**.

The entitlements matching the search criteria are displayed. However, if there is only one seller entitlement matching the search criteria, the Seller Entitlement screen is displayed.

Note: If the administration organization is not an entitlement organization, the entitlements that are available for the entitlement organization of the administration organization are displayed.

Create a Seller Entitlement Rule


Seller entitlement rules are created to include or exclude items in the categories that can be assigned to organizations under seller entitlements. Categories from the master catalog can only be specified under seller entitlement rules.


Note: Ensure that the seller entitlement of a ship-together Bundle item is the same for both the parent and component items in the bundle.

You can create a seller entitlement rule from the Seller Entitlement rule.

To create a seller entitlement rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Seller Entitlements**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Seller Entitlements**.
3. The Seller Entitlement Search screen is displayed. Enter the search criteria, click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement for which you want to manage a rule. Alternatively, double-click the row containing the **Entitlement ID** for which you want to create a rule.
5. The **Entitlement Detail** panel is displayed. Click the **Items** tab.
6. In the **Create Entitlement Item List By** area that is displayed, select either of the following radio buttons adjacent the **all items** box:
 - **Including** - Select this radio button to create the rule including all the items in the corresponding catalog.
 - **Excluding** - Select this radio button to create the rule excluding all the items in the corresponding catalog.
7. In the **Then Apply The Following Criteria** area, define a rule as described in the following table:

Field	Description
Text box*	Enter a sequence number for the rule. Note: Ensure that you specify a unique sequence for the rules.
Then	Select either of the following radio buttons: <ul style="list-style-type: none">▪ Include - Select this radio button to include the items in the entitlement.▪ Exclude - Select this radio button to exclude the items in the entitlement.
all items where the item is associated with category <name of the selected category>	Click  to search for a category to which the items will be associated. The Category Selection tree panel is displayed. Select the required category and click Select . The selected category is displayed in the box.

8. To add another rule, click .

9. A new row is added. Repeat step 2 to define the rule.

10. In the Seller Entitlement screen, click **Save**.


Note: * indicates that the field is mandatory.

A rule or list of rules are created.

Modify a Seller Entitlement Rule

To modify a seller entitlement rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Seller Entitlements**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Seller Entitlements**.
3. The Seller Entitlement Search screen is displayed. Enter the search criteria, click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement for which you want to manage a rule. Alternatively, double-click the row containing the **Entitlement ID** for which you want to modify a rule.
5. In the **Create Entitlement Item List By** area that is displayed, select either of the following radio buttons adjacent to the **all items** box:
 - **Including** -Select this radio button to create the rule including all the items in the corresponding catalog.
 - **Excluding** - Select this radio button to create the rule excluding all the items in the corresponding catalog.
6. In the **Then Apply The Following Criteria** area, make the necessary modifications:

Field	Description
Text box	Enter a new sequence number for the rule. Note: Ensure that you specify a unique sequence for the rules.
Then	Select either of the following radio buttons: <ul style="list-style-type: none">▪ Include - Select this radio button to include the items in the entitlement.▪ Exclude - Select this radio button to exclude the items in the entitlement.
all items where the item is associated with category <name of the selected category>	Click  to search for a new category to which the items will be associated. The Category Selection tree panel is displayed. Select the required category and click Select . The selected category is displayed in the box.


7. In the Seller Entitlement screen, click **Save**.

The seller entitlement rule is modified.

Remove a Seller Entitlement Rule

You can remove a seller entitlement rule if you do not want the items in the categories that are assigned to organizations under the corresponding seller entitlement to be available to the organizations.

To remove a seller entitlement rule:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Seller Entitlements**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Seller Entitlements**.
3. The Seller Entitlement Search screen is displayed. Enter the search criteria, click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlements** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement for which you want to manage a rule. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. In the **Then Apply The Following Criteria** area, click  adjacent the rule you want to remove from the seller entitlement.
6. A message asking for your confirmation is displayed. Click **Yes** to remove the rule.
7. Click **Save**.

The rule is removed from the seller entitlement rule.

Associate an Organization to a Seller Entitlement

When you associate an organization to a seller entitlement, the organization is entitled to access all the categories specified under the entitlement. You can assign only a subcatalog organization to a seller entitlement.

You can associate an organization to a seller entitlement from the Seller Entitlement rule.

To associate an organization to a seller entitlement:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Seller Entitlements**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Seller Entitlements**.
3. The Seller Entitlement Search screen is displayed. Enter the search criteria, click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement to which you want to associate an organization. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. The **Entitlement Detail** panel is displayed. Click the **Storefronts** tab.
6. In the **StoreFronts** area, click **Add**.
7. The Basic Subcatalog Search dialog box is displayed. Enter the search criteria, and click **Search** to view a list of all the available subcatalog organizations.
8. A list of subcatalog organizations is displayed. Select the check box adjacent the corresponding **Storefront ID**, and click **Save**.

The selected storefront is associated to the entitlement, and added to the list of storefronts under the **StoreFronts** tab.

Dissociate an Organization from a Seller Entitlement

When you dissociate an organization from a seller entitlement, the organization is no longer entitled to access the categories specified under the entitlement.

To dissociate an organization from a seller entitlement:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Seller Entitlements**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Seller Entitlements**.
3. The Seller Entitlement Search screen is displayed. Enter the search criteria, click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement from which you want to dissociate an organization. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. The **Entitlement Detail** panel is displayed. Click the **Storefronts** tab.
6. In the **StoreFronts** area, select the check box adjacent the corresponding **Storefront ID**, and click **Remove**.
7. A message asking for your confirmation is displayed. Click **Yes** to dissociate the organization.
The selected storefront is dissociated from the entitlement.

Delete a Seller Entitlement



When you delete a seller entitlement, all the rules that are created for a storefront are not valid anymore.

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Find Seller Entitlements**. Alternatively, in the home page, click the **Find Entitlement** hyperlink under **Seller Entitlements**.
3. The Seller Entitlement Search screen is displayed. Enter the search criteria, click **Search** to view a list of all the available entitlements. Alternatively, use either the **Basic Search** or the **Advanced Search** option to narrow down the list of entitlements displayed.
4. The search results are displayed in the **Entitlement** panel. Click the **Entitlement ID** hyperlink corresponding to the entitlement for which you want to delete. Alternatively, double-click the row containing the corresponding **Entitlement ID**.
5. The **Entitlement Detail** panel is displayed. Click **Delete**.
6. A message asking for your confirmation is displayed. Click **Yes** to delete the seller entitlement.
The selected seller entitlement is deleted.

Test a Customer Entitlement

You can test if an associated customer can access items in a customer entitlement.

To test if a customer can access an item:

1. Log in to Sterling Business Center as an administrator.
2. From the home page, click the **Test Entitlement Setup** hyperlink. Alternatively, click **Test Entitlement Setup** in the **Related Tasks** panel when searching or creating an entitlement.
3. The Customer Verification screen is displayed. Perform the following steps:
 - a. Click  adjacent to the **Customer ID*** box.
 - b. The Customer Search dialog box is displayed. Perform any of the following steps that is applicable to search for a customer:
 - i. In the **E-mail Starts With** text box, enter either the complete or partial E-mail ID of the customer.
 - ii. In the **Last Name** text box, enter the customer's last name.
 - iii. In the **Day Phone #** text box, enter the customer's day phone number. Ensure that you do not enter space or special characters when entering the phone number. Otherwise, customers matching the search criteria are not displayed in the **Customer List** panel.
 - iv. In the **First Name** text box, enter the customer's first name.
 - v. In the **Customer ID** text box, enter the unique identifier of the customer.
 - vi. In the **Zip Code** text box, enter the zip code of the city to which the customer belongs.
 - vii. Click **Search**.
 - viii. The ID and name of the customers matching the search criteria are displayed in the **Customer List** panel. Select the check box adjacent to the **Customer ID** corresponding to the customer for which you want to test entitlements.
 - ix. Click **Save**.
 - c. The selected Customer ID is displayed in the **Customer ID*** text box.
 - d. In the **Item ID*** text box, click .
 - e. The Item Search dialog box is displayed. Perform the following steps:
 - i. Enter the search criteria, and click **Search**.
 - ii. In the **Items** panel that is displayed, select the item that you want to test.
 - iii. Click **Select**.
 - f. The selected Item ID is displayed in the **Item ID*** text box.

4. Click **Test**.

Note: * indicates that the field is mandatory.

The “The customer <Customer ID> is entitled to the item <Item ID>.” message is displayed if the customer has access to the items based on the entitlements that have been set up. Otherwise, the “The customer <Customer ID> is not entitled to the item <Item ID>.” message is displayed.

Define Master Catalog Details

A master catalog is a comprehensive list of items belonging to an organization. It is created by default when a catalog organization is created. A master catalog can also be used as an active selling catalog. An active selling catalog represents a category hierarchy that is used by customers.

You can define master catalog details from the Catalog Management screen.

To define master catalog details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Browse Maintenance Catalog**. Alternatively, click the **Browse Maintenance Catalog** hyperlink in the home page.
3. The Catalog Management screen is displayed. Perform the following steps in the **Catalog Detail** panel:
 - a. In the **Short Description*** box, enter a brief description of the master catalog. This master catalog will be identified by this description in the **Catalog Hierarchy** tree.
 - b. In the **Long Description** box, enter a detailed description of the master catalog. This detailed description typically contains any additional information about the master catalog.
4. In the Catalog Management screen, click **Save**.

Note: * indicates that the field is mandatory.


The master catalog details are defined.

Create a Catalog

A catalog is a hierarchy of items belonging to an organization. You can create multiple catalogs if you require different groupings for the items. However, only one catalog can be an active selling catalog at a given time. For example, if you are a retail organization with two distinct products, shoes and shirts you can create two separate catalogs, one for the shoe line, and one for the shirt line. You can also define a different selling catalog for the different seasons of the year if you sell different items during different seasons.

You can create a catalog from the Catalog List screen.

To create a catalog:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. In the **Related Tasks** panel, click **Create Catalog**.
4. The **Catalog Detail** panel is displayed. Perform the following steps:
 - a. In the **Catalog ID*** box, enter a unique identifier (ID) of the catalog. This identifier cannot be modified after it has been defined.
 - b. In the **Short Description*** box, enter a brief description of the catalog. This catalog will be identified by this description in the **Catalog Hierarchy** tree.
 - c. In the **Long Description** box, enter a detailed description of the catalog. This detailed description typically contains any additional information about the catalog.
 - d. Catalog organization users can authorize the entire catalog to a subcatalog organization so that the subcatalog organization can refer to the catalog as its own catalog. To authorize the entire catalog to a subcatalog organization, click  adjacent the **Authorized To** box. The Basic Subcatalog Search dialog box is displayed. Perform the following steps:
 - i. Enter the search criteria, and click **Search**. Alternatively, use **Advanced Search** to narrow down the search results.
 - ii. A list of subcatalog organizations is displayed. Select the check box adjacent the corresponding **Organization ID**, and click **Save**.The selected subcatalog organization is displayed in the **Authorized To** box.
5. In the Catalog Management screen, click **Save**.

Note: * indicates that the field is mandatory.


The catalog is created. The **Catalog Hierarchy** tree is displayed.

Authorize a Subcatalog Organization to Manage a Catalog

Subcatalog organizations are enterprises that refer to the catalog organization as their own catalog organization. The catalog organization authorizes subcatalog organizations to manage the categories within the master catalog, and define seller entitlements that grant or restrict other organizations' access to the categories within the master catalog.

You can authorize a subcatalog organization to manage a catalog from the Catalog List screen.

To authorize a subcatalog organization to manage a catalog:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. In the **Related Tasks** panel, click **Create Catalog**.
4. The **Catalog Detail** panel is displayed. Click  adjacent the **Authorized To** box.
5. The Basic Subcatalog Search dialog box is displayed. Perform the following steps:
 - a. Enter the search criteria, and click **Search**.
 - b. A list of subcatalog organizations is displayed. Select the check box adjacent the corresponding organization ID.
 - c. Click **Save**.

The selected subcatalog organization is displayed in the **Authorized To** box.

6. In the Catalog Management screen, click **Save**.

The subcatalog organization is authorized to manage the catalog.

Notes:

- You can authorize a subcatalog organization to manage a catalog only during the process of creating the catalog.
- You can neither dissociate a subcatalog organization from a catalog nor replace it with another subcatalog organization.



Modify Catalog Details

You can modify the short description and long description pertaining to a catalog.

To modify a catalog's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog whose details you want to modify.
4. The **Catalog Details** panel is displayed. Make the necessary modifications:
 - In the **Short Description** field, modify the brief description of the catalog.
 - In the **Long Description** field, modify the detailed description of the catalog.

Note: The **Catalog ID** box and **Authorized To** box are displayed as read-only boxes.
5. Click **Save**.

Note: If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).

The catalog is modified.

Set a Catalog as an Active Selling Catalog

An active selling catalog represents a category hierarchy that is used by customers. Selling catalogs help customers navigate to and narrow down specific items. There can only be one active selling catalog at a given time for a catalog organization or a subcatalog organization.

You can set a catalog as an active selling catalog from the Catalog List screen.

To set a catalog as an active selling catalog:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Select the **Active Selling Catalog** radio button corresponding to the catalog that you want to set as an active selling catalog.
4. Click **Save**.

The catalog is set as an active selling catalog. After setting a catalog as an active selling catalog, you can select the **Browse Selling Category** from the **Item** menu or click the **Browse Selling Category** hyperlink in the home page in order to perform tasks such as creating a category, managing an asset, and so on.

Add an Asset to a Catalog

Assets are electronic media objects that you associate with items, categories, attributes, and attribute values. Asset types include images, video, audio, and text files.

You must specify the content location for each of the assets. Typically, assets are digitally-based objects that reside on external systems. For example, you can assign an image file to a category that is available from an online catalog so that online customers can view an image that represents this category. In such a scenario, you must provide a content location for the image file. Content location is the path that identifies the location of the image file.

You can add an asset to a catalog from the Catalog Management screen.

To add an asset to a catalog:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the corresponding **Catalog ID** hyperlink.
4. The Catalog Management screen is displayed. In the **Related Tasks** Panel, click **Manage Catalog Assets**.
5. The **Catalog Assets** panel is displayed. Click **Add**.
6. The Asset Detail dialog box is displayed. Perform the following steps:
 - a. In the **Asset ID*** box, enter a unique identifier (ID) for the asset.
 - b. In the **Short Description*** box, enter a brief description of the asset.
 - c. In the **Long Description** box, enter a detailed description of the asset.
 - d. From the **Server** drop-down list, select the server on which this asset type is located. The drop-down list is either populated by all the available server locations, or the codes that are configured in the Applications Manager.
 - e. From the **Type** drop-down list, select the asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - f. In the **File** box, enter the name of the file.
 - g. Click **Save**.

The asset is added to the catalog.

Modify Asset Details in a Catalog

You can choose to modify the short description and description of an asset. You can also modify the location of the server, asset type, and the name of the file in which the asset is created.

To modify asset details in a catalog:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the corresponding **Catalog ID** hyperlink.
4. The Catalog Management screen is displayed. In the **Related Tasks** Panel, click **Manage Catalog Assets**.
5. The **Catalog Assets** panel is displayed. Select the check box adjacent the asset you want to modify.
6. The **Asset Detail** panel is displayed. Make the necessary modifications:
 - In the **Short Description*** box, enter a new brief description of the asset.
 - In the **Long Description** box, enter a new detailed description of the asset.
 - From the **Server** drop-down list, select a new server on which this asset type is located.
 - From the **Type** drop-down list, select a new asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - In the **File** box, enter a new name of the file.
 - Click **Save**.

Note: The **Asset ID** box is displayed as a read-only box.

The asset is modified.

Delete an Asset from a Catalog

You can delete an asset from a catalog if you do not want any of the electronic media objects to be associated with the catalog.

To delete an asset from a catalog:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the corresponding **Catalog ID** hyperlink.
4. The Catalog Management screen is displayed. In the **Related Tasks** panel, click **Manage Catalog Assets**.
5. The **Catalog Assets** panel is displayed. Select the check box adjacent the asset you want to delete.
6. Click **Delete**.
7. A message asking you for confirmation is displayed. Click **Yes** to delete the asset.
The asset is deleted from the catalog.

Create a Category

You can create a category to provide your catalog with a means to organize all the items into different hierarchical and searchable groupings. After creating a category for a catalog, you can create subcategories, add items, provided services, and assign attributes to the category.

You can create a category from the Catalog Management screen.

To create a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog for which you want to create a category.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category under which you want to create the new category. However, to create a root level category, select the catalog from the **Catalog Hierarchy** tree.
5. In the **Related Tasks** panel, click **Create Category**.
6. The Category Details screen is displayed. Perform the following steps:
 - a. In the **Category ID*** field, enter a unique identifier (ID) for the category. This identifier cannot be modified after it has been defined. Do not put a space or special characters in the Category ID.
 - b. In the **Short Description** field, enter a brief description of the category. The category will be identified by this description in the **Catalog Hierarchy** tree.
 - c. In the **Long Description** field, enter a detailed description of the category. This detailed description typically contains any additional information about the category.
7. In the Category Details screen, click **Save**.

Note: * indicates that the field is mandatory.

A new category is created and is displayed in the **Catalog Hierarchy** tree either under the corresponding catalog or corresponding category. After creating the category, you can now manage items for the category.

See also:

- [Assign an Item to a Category](#)
- [Move an Item from One Category to Another Category](#)
- [Remove an Item from a Category](#)

Modify Category Details



You can modify the short description and long description of a category.

To modify a category's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog whose category you want to modify.
4. The Catalog Management screen is displayed. From the **Catalog** panel, select the category that you want to modify.
5. The **Category Detail** panel is displayed. Make the necessary modifications:
 - In the **Short Description** field, modify the brief description of the category.
 - From the **Status** drop-down list, select the status for the category. You can select any one of the following options:
 - **Held (Unpublished)**: select this to make the category unavailable for order creation.
 - **Published**: select this to make the category available for order creation.
 - In the **Long Description** field, modify the detailed description of the category.

Note: The **Catalog ID** box is displayed as a read-only box.

6. In the Category Details screen, click **Save**.

Note: If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).

The category is modified. After modifying the category details, you can now manage items for the category.



See also:

- [Assign an Item to a Category](#)
- [Move an Item from One Category to Another Category](#)
- [Remove an Item from a Category](#)

Modify the Sequence of Categories and Child Categories

You can modify the sequence of categories and child categories to group them logically. The sequence of the categories and child categories determines the sequence in which the items are displayed in the organization's web site.

To modify the sequence of categories or child categories:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. In the Catalog List screen that is displayed perform any one of the following steps:
 - In the **Master Catalog** panel, click the **Master Catalog** hyperlink.
 - In the **Catalogs** panel, click the required **Catalog** hyperlink.
 - In the **Related Tasks** panel, click either **Browse Maintenance Catalog** or **Browse Selling Catalog**.
4. The Catalog Management screen is displayed. In the tree of the **Catalog Hierarchy** panel, perform the following tasks:
 - Select the category or child categories whose sequence you want to change and either click  to move it one position above the current position in the tree view, or click  to move it one position below the current position in the tree view. These icons enable you to move the category or child category only one position above or below within the same catalog.
 - Select the category or child category and drag it to the position at which you want to place it. The position of the selected category or child category is modified.

The sequence of category and child category is modified.


Note: You cannot move a child category between different parent categories.

Authorize a Subcatalog Organization to Manage a Category

Subcatalog organizations are enterprises that refer to the catalog organization as their own catalog organization. The catalog organization authorizes subcatalog organizations to manage the categories within the master catalog, and define seller entitlements that grant or restrict other organizations' access to the categories within the master catalog.

You can authorize a subcatalog organization to manage a category from the Catalog List screen.

To authorize a subcatalog organization to manage a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the required catalog.
4. The Catalog Management screen is displayed. In the **Related Tasks** panel, click **Create Category**.
5. The **Create Category** panel is displayed. Click  adjacent the **Authorized To** box.
6. The Basic Subcatalog Search dialog box is displayed. Perform the following steps:
 - a. Enter the search criteria, and click **Search**.
 - b. A list of subcatalog organizations is displayed. Select the check box adjacent the corresponding organization ID.
 - c. Click **Save**.

The selected subcatalog organization is displayed in the **Authorized To** box.

7. In the Catalog Management screen, click **Save**.

The subcatalog organization is authorized to manage the category.

Notes:

- You can authorize a subcatalog organization to manage a category only during the process of creating the category.
- You can neither dissociate a subcatalog organization from a category nor replace it with another subcatalog organization.

Assign an Item to a Category

You can assign different hierarchical and searchable groupings to all the items in a category. The items in the category inherit the attributes assigned to that category.

You can assign an item to a category from the Catalog Management screen.

To assign an item to a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog for whose category you want to assign an item.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category for which you want to assign an item.
5. The **Items and Services** panel is displayed. Click **Add Item**.
6. The Basic Item Search dialog box is displayed. Perform the following steps:
 - a. Enter the search criteria.
 - b. Click **Search**.
 - c. From the **Items** panel that is displayed, select the check box adjacent the item you want to add. To assign multiple items, select the check box adjacent the required items.
 - d. Click **Select**.

The selected items are displayed in the **Items and Services** panel in the Catalog Management screen.

Assign a Provided Service to a Category

You can assign a provided service to a category from the Catalog Management screen.

To assign a provided service to a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog for whose category you want to assign a provided service.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category for which you want to assign a provided service.
5. The **Items and Services** panel is displayed. Click **Add Service**.
6. The Basic Service Search dialog box is displayed. Perform the following steps:
 - a. Enter the search criteria.
 - b. Click **Search**.
 - c. From the **Services** panel that is displayed, select the check box adjacent the provided service you want to assign to the category. To assign multiple services, select the check box adjacent the required provided services.
 - d. Click **Select**.

The selected services are displayed in the **Items and Services** panel in the Catalog Management screen.

Move an Item from One Category to Another Category

You can move an item from one category to another category if the item belongs to another category from the Catalog Management screen.

To move an item from one category to another category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog from whose category you want to move an item.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category from which you want to move an item.
5. The **Items and Services** panel is displayed. Select the check box adjacent the item you want to move to another category.
6. Click **Move To Category**.
7. The **Catalog Hierarchy** tree is displayed. Select the category to which you want to move the item, and click **Select**.

The item is moved to the selected category.

Move a Provided Service from One Category to Another Category

You can move a provided service from one category to another category if the provided service belongs to another category from the Catalog Management screen.





To move a provided service from one category to another category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog from whose category you want to move a provided service.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category from which you want to move a provided service.
5. The **Items and Services** panel is displayed. Select the check box adjacent the provided service you want to move to another category.
6. Click **Move To Category**.
7. The **Catalog Hierarchy** tree is displayed. Select the category to which you want to move the provided service, and click **Select**.

The provided service is moved to the selected category.

Assign Multiple Values to an Attribute in a Category

To assign multiple values to an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item Administration** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Category List screen is displayed. Click the corresponding **Catalog ID** hyperlink.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the corresponding category.
5. In the **Related Tasks** panel, click **Manage Attribute**.
6. The **Attributes** panel is displayed. Click the **Attribute Name** hyperlink pertaining to the attribute to which you want to assign multiple values.
7. The details pertaining to the attribute are displayed. Click  adjacent the value.
8. The Select Multi Attribute Values dialog box is displayed. To assign a value to the attribute, click .
Note: When the number of allowed values defined for a text attribute is less than or equal to 30, a drop-down list is displayed. If the number of text attribute value exceeds 30, the drop-down list is replaced by a text box with a search icon. You can use this search icon to search for a text attribute value. When you click the search icon, the **Allowed Values Search** dialog box is displayed. Enter the text attribute value or the text attribute value description to search for a text attribute value, and click **Search**. A list of allowed values that matches your search criteria is displayed. Select the required text attribute value, and click **Select**. Use  adjacent to the search icon to clear the existing text attribute value.
9. A new row is added. One of the following elements are displayed based on the properties defined for this attribute.
 - Text Box - If a text box is displayed, enter the required value.
 - Drop-down List - If a drop-down list is displayed, select the required value.
10. To add multiple values, repeat step 7 through step 9.
11. To delete a value, click  adjacent corresponding the value.
12. Click **Select**.
13. Click **Save**.

The selected values are assigned to the attribute.

Remove an Item from a Category

When an item is removed from a category, the item is no longer defined by the attributes assigned to the category.

To remove an item from a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog from whose category you want to remove an item.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category from which you want to remove an item.
5. The **Items and Services** panel is displayed. Select the check box adjacent the item you want to remove.
6. Click **Remove**.
7. A message asking you for confirmation is displayed. Click **Yes** to remove the item.
The selected item is removed from the category.

Remove a Provided Service from a Category

To remove a provided service from a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog from whose category you want to remove a provided service.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category from which you want to remove a provided service.
5. The **Items and Services** panel is displayed. Select the check box adjacent the provided service you want to remove.
6. Click **Remove**.
7. A message asking you for confirmation is displayed. Click **Yes** to remove the provided service.
The selected provided service is removed from the category.

Add an Asset to a Category

Assets are electronic media objects that you associate with items, categories, attributes, and attribute values. Asset types include images, video, audio, and text files.

You must specify the content location for each of the assets. Typically, assets are digitally-based objects that reside on external systems. For example, you can assign an image file to a category that is available from an online catalog so that online customers can view an image that represents this category. In such a scenario, you must provide a content location for the image file. Content location is the path that identifies the location of the image file.

You can add an asset to a category from the Catalog Management screen.

To add an asset to a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the corresponding **Catalog ID** hyperlink.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category to which you want to associate an asset.
5. In the **Related Tasks** Panel, click **Manage Category Assets**.
6. The **Category Assets** panel is displayed. Click **Add**.
7. The Asset Detail dialog box is displayed. Perform the following steps:
 - a. In the **Asset ID*** box, enter a unique identifier (ID) for the asset.
 - b. In the **Short Description*** box, enter a brief description of the asset.
 - c. In the **Long Description** box, enter a detailed description of the asset.
 - d. From the **Server** drop-down list, select the server on which this asset type is located. The drop-down list is either populated by all the available server locations, or the codes that are configured in the Applications Manager.
 - e. From the **Type** drop-down list, select the asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - f. In the **File** box, enter the name of the file.
 - g. Click **Save**.

The asset is added to the category.

Modify Asset Details in a Category

You can choose to modify the short description and description of an asset. You can also modify the location of the server, asset type, and the name of the file in which the asset is created.

To modify an asset's details:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the corresponding **Catalog ID** hyperlink.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category whose asset details you want to modify.
5. In the **Related Tasks** Panel, click **Manage Category Assets**.
6. The **Category Assets** panel is displayed. Select the check box adjacent the asset you want to modify.
7. The **Asset Detail** panel is displayed. Make the necessary modifications:
 - In the **Short Description*** box, enter a new brief description of the asset.
 - In the **Long Description** box, enter a new detailed description of the asset.
 - From the **Server** drop-down list, select a new server on which this asset type is located.
 - From the **Type** drop-down list, select a new asset type. If the selected asset type pertains to an image, the preview of the corresponding image is displayed in the **Assets** panel after the server and the filename have been specified.
 - In the **File** box, enter a new name of the file.
 - Click **Save**.

Note: The **Asset ID** box is displayed as a read-only box.

The asset is modified.

Delete an Asset from a Category

You can delete an asset from a category if you do not want any of the electronic media objects to be associated with the category.

To delete an asset from a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the corresponding **Catalog ID** hyperlink.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category from which you want to delete an asset.
5. In the **Related Tasks** panel, click **Manage Category Assets**.
6. The **Category Assets** panel is displayed. Select the check box adjacent the asset you want to delete.
7. Click **Delete**.
8. A message asking you for confirmation is displayed. Click **Yes** to delete the asset.
The asset is delete from the category.

Assign an Attribute to a Category

Attributes are the common properties that are assigned to a category. Items that are assigned to the category inherit these attributes. You can specify values for each item attribute. For example, for the Television category, you can assign Size, Type, and so on as item attributes. You can also assign values for the Size attribute as 21 inches, and for the Type attribute as LCD. All the items in the Television category will inherit the same value for the corresponding attributes that you assign to the Television category.

The following types of attributes can be assigned to a category:

- Attribute with valid values - You can assign a text attribute, Boolean attribute, or number attribute.
- Attribute that refers to an item field - You can assign an attribute that refers to an out-of-the-box item field.
- Derived attribute - You can assign a derived attribute that is derived from another attribute.
- Computed attribute - You can assign a computed attribute that is specific to the pricing administration.

You can assign an attribute to a category from the Catalog Management screen.

To assign an attribute for a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog for whose category you want to assign an attribute.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category to which you want to assign an attribute.
5. In the **Related Tasks** panel, click **Manage Attributes Assignment**.
6. The **Attributes** panel is displayed. Click **Add**.
7. The Select Attribute dialog box is displayed. Select an attribute from the Attribute tree, and click **Select**.

The selected attribute is added to the category.


Assign a Value to an Attribute in a Category

You can specify values for each item attribute in a category only if it belongs to a master catalog. For example, for the Television category, you can assign Size, Type, and so on as item attributes. You can also assign values or multiple values for the Size attribute as 21 inches, and for the Type attribute as LCD.


You can assign a value to an attribute in a category from the Catalog Management screen.

To assign a value to an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the corresponding **Catalog ID** hyperlink.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the corresponding category.
5. In the **Related Tasks** panel, click **Manage Attribute Assignment**.
6. The **Attributes** panel is displayed. Click the **Attribute Name** hyperlink pertaining to the attribute to which you want to assign a value.
7. The details of the attribute are displayed. Depending on the data type, you can perform the following to assign an attribute value:
 - If it is a text data type, enter the new value in the respective field.

Note: When the number of allowed values defined for a text attribute is less than or equal to 30, a drop-down list is displayed. If the number of text attribute value exceeds 30, the drop-down list is replaced by a text box with a search icon. You can use this search icon to search for a text attribute value. When you click the search icon, the **Allowed Values Search** dialog box is displayed. Enter the text attribute value or the text attribute value description to search for a text attribute value, and click **Search**. A list of allowed values that matches your search criteria is displayed. Select the required text attribute value, and click Select. Use  adjacent to the search icon to clear the existing text attribute value.

- If it is a Boolean data type, select or clear the respective check box.
- If it is a number data type, enter the new value in the respective field.

- If the multiple values are allowed for the attribute, click the **Modify** hyperlink. In the Select Multi Attribute Values dialog box that is displayed, perform the following steps:
 - i. Click  to add another value.
 - ii. From the drop-down list that is displayed, select the required value.
 - iii. To add multiple values, repeat step i through step ii.
 - iv. Click **Select**.

The selected values are displayed in the **Values** box in the **Attribute** panel.

Tip: To remove a value, click  adjacent the respective value.

Notes:

- Although there are three basic data types, the way each of these is displayed depends on how the attributes are configured in the Attribute Management. Example - for a number data type, the values may be listed as a drop-down list, instead of a text box.
 - If an attribute assigned to a category contains a default value, this value is displayed by default in the corresponding field of the Attribute Management screen pertaining to the category. However, unless you click **Save**, this value is not assigned by default to the items in that category.
 - If the number of values in the drop-down list is greater than thirty, a text box will be displayed instead of the drop-down list.
8. In the **Attributes** panel, click **Save**.
- The value is assigned to the attribute.

Assign a Usage to an Attribute in a Category

You can assign a usage to an attribute to specify about how the attribute will be used in a category. For example, you can specify the usage Searchable attributes for an attribute to specify that this attribute is used for searches.

You can assign a usage to an attribute in a category from the Catalog Management screen.

To assign a usage to an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the corresponding **Catalog ID** hyperlink.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select a category.
5. In the **Related Tasks** panel, click **Manage Attribute Assignment**.
6. The **Attributes** panel is displayed. Click the **Attribute Name** hyperlink pertaining to the attribute to which you want to assign a value.
7. The details of the attribute are displayed. Under **Usages**, select the following check boxes:
 - **Specification** - Select this check box to specify that this attribute is displayed as an item specification on the Sterling Web application. This option is available only when managing the master catalog.
 - **For Filter** - Select this check box to specify that this attribute is used to narrow the search results on a Sterling Web application.
8. **For Comparison** - Select this check box to specify that this attribute is used to compare items. This option is available only when managing the master catalog.
9. Click **Save**.

The usage is assigned to the attribute.

Remove an Attribute from a Category

You can remove an attribute from a category if you do not want items in the category defined by this attribute.

To remove an attribute from a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog from whose category you want to remove an attribute.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category from which you want to remove an attribute.
5. In the **Related Tasks** panel, click **Manage Attributes Assignment**.
6. The **Attributes** panel is displayed. Select the check box adjacent the attribute you want to remove from the category.
7. Click **Remove**.
8. A message asking you for confirmation is displayed. Click **Yes** to remove the attribute.
The selected attribute is removed from the category.

Associate a Keyword to a Category

Keywords act as alternative identifiers for a category. Keywords are a list of strings that can be used by a customer using the Sterling Web application when searching for a category. For example, a keyword for a Televisions category can be TV.

You can associate a keyword to a category from the Catalog Management screen.

To associate a keyword to a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog for whose category you want to define keywords.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category to which you want to associate a keyword.
5. In the **Related Tasks** panel, click **Manage Keywords**.
6. The Keywords screen is displayed. In the **Keywords** box, enter the keywords for a category. You can enter multiple keywords by separating each word with a comma.
7. Click **Save**.

The keywords are associated to the category.

Dissociate a Keyword from a Category

You can dissociate a keyword from a category if you do not want the keyword to act as an alternative identifier for the category. If you have associated multiple keywords to a category, you can dissociate specific keywords and retain the required keywords.

To dissociate a keyword from a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the corresponding **Catalog ID** hyperlink.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category from which you want to dissociate a keyword.
5. In the **Related Tasks** panel, click **Manage Keywords**.
6. The Keywords screen is displayed. In the **Keywords** box, delete the corresponding keywords.
7. Click **Save**.

The keywords are dissociated from the category.

Delete a Category

You can delete a category only if you have deleted the subcategories, items and, assigned attributes from the category. However, you cannot delete a category if it is in the **Published** status.

To delete a category:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog whose category you want to delete.
4. The Catalog Management screen is displayed. From the **Catalog Hierarchy** tree, select the category that you want to delete.
5. The **Category Details** panel is displayed. Click **Delete**.
6. A message asking you for confirmation is displayed. Click **Yes** to delete the category.

The selected category is deleted from the **Catalog Hierarchy** tree. If the category belonged to another category, the details of the parent category are displayed. However, if the category was a root-level category, the details of the parent catalog are displayed.

Delete a Catalog

You can delete a catalog only after you have deleted all the categories in that catalog. However, you cannot delete a master catalog and an active selling catalog.

To delete a catalog:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Catalogs**. Alternatively, click the **Manage Catalogs** hyperlink in the home page.
3. The Catalog List screen is displayed. Click the **Catalog ID** hyperlink corresponding to the catalog you want to delete.
4. The **Catalog Details** panel is displayed. Click **Delete**.
5. A message asking you for confirmation is displayed. Click **Yes** to delete the catalog.
The catalog is deleted.

View Classification List

You can view existing classifications in order to manage them. You can view the corresponding description, associated field, and usages subscribed to a classification.

To view classification list:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed with a list of existing classifications.

Note: You can click the Classification hyperlink to view the classification details.

See also:

- [Create a Classification](#)

Create a Classification

You can create a classification to classify items with similar characteristics in a catalog. For example, you have items that contain hazardous materials and items that do not contain hazardous materials in your catalog. You want to source hazardous items out of Node 1 and non-hazardous materials out of Node 2. In this scenario, you can create an item classification for the Hazardous Materials item attribute, which is used for sourcing.

You can create a classification from the Classification Management screen.

To create a classification:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. In the **Related Tasks** panel, click **Create Classification**.
4. The Classification Management screen is displayed. Perform the following steps in the **Create Classification** panel:
 - a. In the **Classification ID*** box, enter a unique identifier (ID) for the classification. This identifier cannot be modified after it has been defined.
 - b. In the **Short Description*** box, enter a brief description of the classification.
 - c. In the **Long Description** box, enter a detailed description of the classification. This detailed description typically contains any additional information about the classification.
 - d. From the **Associated Item Field*** drop-down list, select the associated item field that will be used to hold the classification value when associating a classification value to an item.
5. Click **Save**.

Note: * indicates that the field is mandatory.

A new classification is created.



Modify a Classification

You can modify the short description and the long description of a classification.

To modify the details of a classification:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification you want to modify.
4. The **Classification Details** panel is displayed. Make the necessary modifications:
 - a. In the **Short Description*** box, modify the brief description of the classification.
 - b. In the **Long Description** box, modify the detailed description of the classification.

Note: The **Classification ID*** box and **Associated Item Field** box are displayed as read-only boxes.
5. Click **Save**.

Note: If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).

The classification is modified.

Add a Usage to a Classification



You can add a usage to a classification to specify about how the classification will be used. For example, you have created a classification called Apparel. Under this classification you have two lines of clothing: Men's and Women's. If you want to source men's apparel from Node 1 and women's apparel from Node 2, you can select the Sourcing classification usage.

You can add a usage to a classification from the Classification Management screen.

To add a purpose to a classification:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the corresponding **Classification ID** hyperlink.
4. The **Classification Details** panel is displayed. From the **Available Usages** list, select the purpose that you want to associate to the classification. The usages that have already been assigned to another classification are disabled.

Note: Usages are listed in the **Available Usages** list as part of factory setup.



5. Click . To add all the available usages, click .
6. Click **Save**.

The usage or usages are added.

Remove a Usage from a Classification

You can remove a usage from a classification if you do not want this usage to define about how the classification will be used.

To remove a usage from a classification:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the corresponding **Classification ID** hyperlink.
4. The **Classification Details** panel is displayed. From the **Subscribed Usages** area, select the usage that you want to remove.
5. Click . To remove all the usages, click .
6. Click **Save**.

The usage or usages are removed.

Create a Classification Value

A classification hierarchy contains all the values that are defined for a classification, and the classification is always associated to an attribute in the item master catalog. Thus, this classification hierarchy contains all the values that can be associated to the item attribute.

You can create a classification value from the Classification Management screen.

To create classification value:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification whose value you want to define.
4. The **Classification Details** panel is displayed. In the **Related Tasks** panel, click **Create Classification Value**. If you want to create a value under an existing value, select the corresponding value in the **Classification Hierarchy** panel, and click **Create Classification Value** in the **Related Tasks** panel.
5. The **Create Classification Value** panel in which you can perform the following tasks is displayed:
 - In the **Classification Value ID*** box, enter a unique identifier (ID) for the value.
 - In the **Short Description*** box, enter a brief description of the value.
 - In the **Long Description** box, enter a detailed description of the value. This detailed description typically contains additional information about the classification value.
6. Click **Save**.

Note: * indicates that the field is mandatory.

The classification value is created, and is displayed in the **Classification Hierarchy** panel.

Modify a Classification Value



You can modify the short description and long description of a classification value that is associated to the item attribute in the item master catalog.

To modify a classification value:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification whose value you want to define.
4. The **Classification Details** panel is displayed. From the **Classification Hierarchy** panel, select the corresponding value that you want to modify.
5. The **Classification Value Details** panel is displayed. Make the necessary modifications:
 - In the **Short Description*** box, modify the brief description of the value.
 - In the **Long Description** box, modify the detailed description of the value.

Note: The **Classification Value ID** box is displayed as a read-only box.
6. Click **Save**.

Notes:

- If more than one locale is configured,  is displayed adjacent to all the localizable fields and the **Localize** related task is displayed in the **Related Tasks** panel. The localizable fields such as Short Description, Long Description, and so on, are always displayed in the base locale irrespective of the user locale. Also for all the localizable fields, you can enter a value only in the base locale and not in the user locale. To provide a value in the user locale, click either  or the **Localize** related task, and then enter the value in the user locale. For example, if Sterling Business Center is localized to French with the base locale as English, and a French user logs in to Sterling Business Center, all the UI literals except the localizable fields are displayed in French. The localizable fields are displayed in English. For more information about localizing a field, refer to the topic, [Localize the Fields in the Sterling Business Center Application](#).
- * indicates that the field is mandatory.

The classification value is modified.

Assign an Item to a Classification

You can assign items to a classification in order to classify the items in the corresponding catalog from the Classification Management screen.

To assign an item to a classification:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification to which you want to assign an item.
4. From the Classification Hierarchy tree that is displayed, select the corresponding classification value. The **Classification Value Details** panel is displayed.
5. In the **Related Tasks** panel, click **Manage Items**.
6. In the **Items** panel that is displayed, click **Add**.
7. The Basic Item Search dialog box is displayed. Perform the following steps:
 - a. Enter the search criteria.
 - b. Click **Search**.
 - c. The **Items** panel containing the list of items with the corresponding classification values is displayed. Select the check box adjacent the item you want to assign to the classification.
 - d. Click **Select**. If the selected item has already been assigned to a classification value, the new classification value overrides the earlier value.

The item is assigned to the classification.

Move an Item from One Classification Value to Another Classification Value

To move an item from one classification value to another classification value:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification from which you want to move an item to another classification.
4. From the Classification Hierarchy tree that is displayed, select the corresponding classification value. The **Classification Value Details** panel is displayed.
5. In the **Related Tasks** panel, click **Manage Items**.
6. In the **Items** panel that is displayed, select the check box adjacent the item you want to move to another classification value.
7. Click **Move To Classification Value**.
8. The Classification Hierarchy dialog box is displayed. Select the classification value to which you want to move the item.
9. Click **Select**.
The item is moved to the selected classification value.

Remove an Item from a Classification

You can remove an item from a classification if you do not want this item to be classified in the corresponding catalog.

To remove an item from a classification:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification from which you want to remove an item.
4. From the Classification Hierarchy tree that is displayed, select the corresponding classification value. The **Classification Value Details** panel is displayed.
5. In the **Related Tasks** panel, click **Manage Items**.
6. In the **Items** panel that is displayed, select the check box adjacent the item you want to remove from the classification.
7. Click **Remove**.
8. A message asking you for confirmation is displayed. Click **Yes** to remove the classification. The selected item is removed from the classification.

Assign an Attribute to a Classification

An attribute is an inherent characteristic of an item. You can assign an attribute to a classification so that all the items in the classification can be assigned the common attribute. You can manage attributes in the context of classifications only if you have selected the Distinct Attributes classification usage when defining the usages for the classifications.

You can assign an attribute to a classification from the Classification Management screen.

To assign an attribute to a classification:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification to which you want to assign an attribute.
4. From the Classification Hierarchy tree that is displayed, select the corresponding classification value. The **Classification Value Details** panel is displayed.
5. In the **Related Tasks** panel, click **Manage Attribute Assignment**.
6. In the **Attributes** panel that is displayed, click **Add**.
7. The Select Attribute dialog box is displayed. Select the attribute that you want to assign to the classification, and click **Select**.

The selected attribute is added to the list of attributes in the **Attributes** panel.

Assign a Usage to an Attribute in a Classification

You can assign a usage to an attribute to specify about how the attribute will be used in a classification. However, you can assign a usage to an attribute only if you have assigned the corresponding classification usage to the classification. For example, you can specify the usage Searchable attributes for an attribute in a classification only when you have specified the Searchable Attributes classification usage.

You can assign a usage to an attribute in a classification that has been assigned the following usages:

- Specifications
- Searchable Attributes
- Item with Variations

You can assign a usage to an attribute in a classification from the Classification Management screen.

To assign a usage to an attribute:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification from which you want to remove an attribute.
4. From the Classification Hierarchy tree that is displayed, select the corresponding classification value. The **Classification Value Details** panel is displayed.
5. In the **Related Tasks** panel, click **Manage Attribute Assignment**.
6. The **Attributes** panel is displayed. Select the check box adjacent the attribute to which you want to assign a usage.
7. The details of the attribute are displayed. Under **Usages**, select the following check boxes:
 - **Specification** - Select this check box to specify that this attribute is displayed as a specification on the Sterling Web application. And, select the **Is Key Attribute** check box to make the item attribute a key attribute.
 - **Searchable Attributes** - Select this check box to specify that this attribute is used for searches. And, select the **Is Key Attribute** check box to make the item attribute a key attribute.
 - **Item Variation Attributes** - Select this check box to specify that this attribute is used to define Items with Variations. And, select the **Is Key Attribute** check box to make the item attribute a key attribute.

Note: These check boxes are displayed based on the classification usage assigned to the classification. For example, if you have assigned the Distinct Attributes classification usage to the classification, the **Distinct Attributes** check box is displayed under **Usages**.
8. Click **Save**.

The usage is assigned to the attribute.

Remove an Attribute from a Classification

You can remove an attribute from a classification if you do not want items in the classification defined by this attribute.

To remove an attribute from a classification:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification from which you want to remove an attribute.
4. From the Classification Hierarchy tree that is displayed, select the corresponding classification value. The **Classification Value Details** panel is displayed.
5. In the **Related Tasks** panel, click **Manage Attribute Assignment**.
6. The **Attributes** panel is displayed. Select the check box adjacent the attribute you want to remove from the classification.
7. Click **Remove**.
8. A message asking you for confirmation is displayed. Click **Yes** to remove the attribute.
The selected attribute is removed from the classification.

Define Inheritable Attribute Fields

You can define inheritable attribute fields in a classification. These are fields that are inherited by the items in the corresponding classification. The inheritable attribute fields can be defined in a classification only if you have assigned the Inherited Item Attributes usage to the corresponding classification.

You can define inheritable attribute fields from the Classification Management screen.

To define inheritable attribute fields:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification to which the Inheritable attributes classification usage has been assigned.
4. From the Classification Hierarchy tree that is displayed, select the corresponding classification value. The **Classification Value Details** panel is displayed.
5. In the **Related Tasks** panel, click **Manage Inheritable Fields**.

The **Classification Value Inheritable Fields** panel with various tabs is displayed. If you do not want to assign a value to the fields in the tabs, you can select the following options from the corresponding drop-down lists:

- Inherit from parent classification - Select this option if the corresponding classification value has a parent classification value. In such a scenario, the value defined for the parent classification is inherited by the corresponding field in an item belonging to the classification. The corresponding field in the **Inheritable Fields** panel remains blank.
 - Use default value - Select this option if the corresponding classification value does not have a parent classification value. In such a scenario, the default value defined for the attribute is inherited by the field in an item belonging to the classification. The corresponding field in the **Inheritable Fields** panel remains blank.
6. Perform the following steps in the **Promising** area:
 - a. From the **ATP Rule** drop-down list, select an ATP rule. The parameters defined in the selected ATP rules are used to determine the available inventory for this item.
 - b. From the **ATP Monitor Rule** drop-down list, select an ATP Monitor rule to use for this item. The minimum inventory levels for this item are based on the parameters set up for the selected ATP Monitor rule.
 - c. From the **Node Level ATP Monitor Rule** drop-down list, select a Node Level ATP Monitor rule to use for this item. The minimum inventory levels for this item are based on the parameters set up for the selected Node Level ATP Monitor rule.
 - d. From the **Use Unplanned Inventory** drop-down list, select the appropriate option to allow the unplanned inventory pertaining to this item to be used.
 - e. In the **Lead Days** box, enter the amount of time (in days) that will be taken to procure the item and make it available for shipping. If this field is left blank, the default value is taken as 30.

- f. In the **Onhand Safety Factory** area, perform the following steps:
 - Select the **Percent** radio button, and enter the percentage of inventory for this item that you want to exclude from on-hand inventory availability.
 - Select the **Units** radio button, and enter the quantity of inventory for this item that you want to exclude from onhand inventory availability.
 - g. From the **Item-Based Allocation Allowed** drop-down list, select the appropriate option to allow item-based allocation for an item from the drop-down list. When the Use Item Based Allocation rule is enabled, the item-based allocation is applicable only for the items and nodes that have the Item Based Allocation Allowed attribute enabled.
 - h. In the **Future Safety Factor Percentage** box, enter the percentage of inventory for this item that you want to exclude from future inventory availability.
7. Click the **Inventory Attributes** tab, and perform the following steps:
 - a. From the **Default Product Class** drop-down list, select the product class.
 - b. From the **Track FIFO in Inventory** drop-down list, select the required option. This indicates that inventory is tracked using the First In First Out (FIFO) number, which is automatically generated by the system.
 8. Click the **Sourcing** tab, and perform the following steps:
 - a. In the **Release an order for this item a total of <number of hours> working hours and <number of days> system days before expected time of shipment** box, enter the number of days and hours an order for this item should be released prior to the expected time of shipment.
 - b. In the **Node needs to be notified at least <number of hours> hours prior to expected time of shipment** box, enter the minimum number of hours before which a node should be notified before the expected time of shipment.
 - c. In the **Item Shipment Consolidation window <number of days> days** box, enter the number of days by which an item can be delayed after its availability date in order to consolidate its shipment with that of other items.
 - d. From the **Assume Infinite Inventory During Promising** drop-down list, select the required option.
 - e. From the **Shipping Allowed** drop-down list, From the **Shipping Allowed** drop-down list, select the required option.
 - f. From the **Delivery Allowed** drop-down list, select the required option to specify if delivery is allowed:
 - g. From the **Pickup Allowed** drop-down list, select the required option to specify if pickup is allowed.
 - h. From the **Forwarding Allowed** drop-down list, select the required option to specify if forwarding is allowed.
 - i. From the **Procurement Allowed** drop-down list, select the required option to specify if procurement is allowed.
 - j. From the **Supersession On Order Allowed** drop-down list, select the required option to specify if supersession on order is allowed.

- k. From the **Gift Wrap Allowed** drop-down list, select the required option to specify if gift wrapping is allowed.
9. Click the **Returns** tab, and perform the following steps:
 - a. From the **Accept Returns For This Item** drop-down list, select the required option to specify if the item can be returned.
 - b. In the **Allow on when the item is returned within <number of days> day(s) of purchase** box, enter the number of days within which the item can be returned after it is purchased.
 10. Click the **Transportation** tab, and perform the following steps:
 - a. From the **Requires Freezer** drop-down list, select the required option to specify if the item require freezer storage during transportation.
 - b. From the **Shipping By Air Allowed** drop-down list, select the required option to specify if the item can be shipped by air.
 - c. From the **Parcel Shipping Allowed** drop-down list, select the required option to specify if parcel shipping is allowed for the item.
 11. Click the **Sales** tab.
 - From the **Eligible for Shipping Discount** drop-down list that is displayed, select the required option to specify if the item is eligible for shipping.
 12. Click the **Other** tab.
 - The fields are displayed only if you have added extended attributes to the item. In the text boxes that are displayed, enter the appropriate values.

Note: These text boxes are displayed based on the data type selected for the extended attributes.
 13. Click **Save**.

The inheritable attribute fields are defined.

Delete a Classification Value

You can delete a classification value that is not required to be associated to the item attribute in the item master catalog. When a classification value is deleted, all the child classification values are also deleted.

To delete a classification value:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification whose value you want to delete.
4. From the **Classification Hierarchy** panel, select the value that you want to delete.
5. The **Classification Value Details** panel is displayed. Click **Delete**.
6. A message asking you for confirmation is displayed. Click **Yes** to delete the classification value.
The classification value is deleted.

Delete a Classification

You cannot delete a classification if it is used by a Classification Usage. Ensure that all the usages are dissociated from the classification prior to deleting the classification.

To delete a classification:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Manage Classifications**. Alternatively, click the **Manage Classifications** hyperlink in the home page.
3. The Classification List screen is displayed. Click the **Classification ID** hyperlink corresponding to the classification you want to delete.
4. The **Classification Details** panel is displayed. Click **Delete**.
5. A message asking for your confirmation is displayed. Click **Yes** to delete the classification.
The classification is deleted, and the Classification List screen is displayed.

Launch the Visual Modeler Application

You can launch the Visual Modeler application from within Sterling Business Center. Use the Visual Modeler application to create model items that define the configurable options available for an item. After creating the model items, you can associate these model items to the corresponding bundle items.

To launch the Visual Modeler application:

1. Log in to Sterling Business Center as an administrator.
2. From the **Item** menu, select **Launch Visual Modeler**. Alternatively, click the **Launch Visual Modeler** hyperlink in the Sterling Business Center home page.

The Visual Modeler login page is displayed in a new browser window.

Notices

This information was developed for products and services offered in the U.S.A.

IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service.

IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this document does not grant you any license to these patents. You can send license inquiries, in writing, to:

IBM Director of Licensing
IBM Corporation
North Castle Drive
Armonk, NY 10504-1785
U.S.A.

For license inquiries regarding double-byte character set (DBCS) information, contact the IBM Intellectual

Property Department in your country or send inquiries, in writing, to:

Intellectual Property Licensing
Legal and Intellectual Property Law
IBM Japan Ltd.
1623-14, Shimotsuruma, Yamato-shi
Kanagawa 242-8502 Japan

The following paragraph does not apply to the United Kingdom or any other country where such provisions are inconsistent with local law: INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS

FOR A PARTICULAR PURPOSE. Some states do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM Web sites are provided for convenience only and do not in any manner serve as an endorsement of those Web sites. The materials at those Web sites are not part of the materials for this IBM product and use of those Web sites is at your own risk.

IBM may use or distribute any of the information you supply in any way it believes appropriate without incurring any obligation to you.

Licensees of this program who wish to have information about it for the purpose of enabling: (i) the exchange of information between independently created programs and other programs (including this one) and (ii) the mutual use of the information which has been exchanged, should contact:

IBM Corporation

J46A/G4

555 Bailey Avenue

San Jose, CA__95141-1003

U.S.A.

Such information may be available, subject to appropriate terms and conditions, including in some cases, payment of a fee.

The licensed program described in this document and all licensed material available for it are provided by IBM under terms of the IBM Customer Agreement, IBM International Program License Agreement or any equivalent agreement between us.

Any performance data contained herein was determined in a controlled environment. Therefore, the results obtained in other operating environments may vary significantly. Some measurements may have been made on development-level systems and there is no guarantee that these measurements will be the same on generally available systems. Furthermore, some measurements may have been estimated through extrapolation. Actual results may vary. Users of this document should verify the applicable data for their specific environment.

Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

All statements regarding IBM's future direction or intent are subject to change or withdrawal without notice, and represent goals and objectives only.

This information is for planning purposes only. The information herein is subject to change before the products described become available. This information contains examples of data and reports used in daily business operations. To illustrate them as completely as possible, the examples include the names of individuals, companies, brands, and products. All of these names are

fictitious and any similarity to the names and addresses used by an actual business enterprise is entirely coincidental.

COPYRIGHT LICENSE:

This information contains sample application programs in source language, which illustrate programming techniques on various operating platforms. You may copy, modify, and distribute these sample programs in any form without payment to IBM, for the purposes of developing, using, marketing or distributing application programs conforming to the application programming interface for the operating platform for which the sample programs are written. These examples have not been thoroughly tested under all conditions. IBM, therefore, cannot guarantee or imply reliability, serviceability, or function of these programs. The sample programs are provided "AS IS", without warranty of any kind. IBM shall not be liable for any damages arising out of your use of the sample programs.

Each copy or any portion of these sample programs or any derivative work, must include a copyright notice as follows:

© IBM 2011. Portions of this code are derived from IBM Corp. Sample Programs.

© Copyright IBM Corp. 2011.

If you are viewing this information softcopy, the photographs and color illustrations may not appear.

Trademarks

IBM, the IBM logo, and ibm.com are trademarks or registered trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the Web at "[Copyright and trademark information](http://www.ibm.com/legal/copytrade.shtml)" at www.ibm.com/legal/copytrade.shtml.

Adobe, the Adobe logo, PostScript, and the PostScript logo are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States, and/or other countries.

IT Infrastructure Library is a registered trademark of the Central Computer and Telecommunications Agency which is now part of the Office of Government Commerce.

Intel, Intel logo, Intel Inside, Intel Inside logo, Intel Centrino, Intel Centrino logo, Celeron, Intel Xeon, Intel SpeedStep, Itanium, and Pentium are trademarks or registered trademarks of Intel Corporation or its subsidiaries in the United States and other countries.

Linux is a registered trademark of Linus Torvalds in the United States, other countries, or both.

Microsoft, Windows, Windows NT, and the Windows logo are trademarks of Microsoft Corporation in the United States, other countries, or both.

ITIL is a registered trademark, and a registered community trademark of the Office of Government Commerce, and is registered in the U.S. Patent and Trademark Office.

UNIX is a registered trademark of The Open Group in the United States and other countries.

Java and all Java-based trademarks and logos are trademarks or registered trademarks of Oracle and/or its affiliates. Cell Broadband Engine is a trademark of Sony Computer Entertainment, Inc. in the United States, other countries, or both and is used under license therefrom.

Linear Tape-Open, LTO, the LTO Logo, Ultrium and the Ultrium Logo are trademarks of HP, IBM Corp. and Quantum in the U.S. and other countries.

Connect Control Center®, Connect:Direct®, Connect:Enterprise, Gentran®, Gentran:Basic®, Gentran:Control®, Gentran:Director®, Gentran:Plus®, Gentran:Realtime®, Gentran:Server®, Gentran:Viewpoint®, Sterling Commerce™, Sterling Information Broker®, and Sterling Integrator® are trademarks or registered trademarks of Sterling Commerce, Inc., an IBM Company.

Other company, product, and service names may be trademarks or service marks of others.

A

- advanced entitlement search
 - adding more criteria 271
- advanced item search
 - adding more criteria 34, 154
- advanced selling entitlement search
 - adding more criteria 292
- attribute
 - add
 - asset 262
 - postfix 259
 - create
 - attribute 238
 - attribute group 236
 - define
 - attribute domain details 235
 - boolean attribute properties 252
 - derived attribute range 256
 - delete
 - attribute group 266
 - derived attribute range 258
 - delete attribute 265
 - modify
 - asset 263
 - attribute details 241
 - attribute group 237
 - postfix 260
 - sequence of attribute groups 243, 312
 - sequence of attributes 243, 312
 - number attribute
 - assign all the numbers 253
 - assign specific numbers 254
 - remove
 - asset 264
 - postfix 261
 - value from text attribute 248
 - text attribute
 - assign a list of values 244
 - assign free-from text value 246
 - view
 - derived attribute 255

B

- bundle
 - assigning service 174
 - changing configuration model 179
 - changing configuration of preconfigured components 180
 - creating a configurable item 176
 - creating a preconfigured item 178

C

- catalog
 - create 303
 - define
 - master catalog details 302
 - delete 332
 - dissociate
 - asset 309
 - modify 305
 - asset details 308
 - set
 - active selling catalog 306
- category
 - assign
 - attribute 324
 - item 314, 315
 - keyword 329
 - usage to an attribute 327
 - value to an attribute 325
 - associate
 - asset 307, 321
 - create 310
 - delete 331
 - dissociate
 - asset 323
 - keyword 330
 - modify 311
 - asset details 322
 - move
 - item 316, 317
 - remove
 - attribute 328

- item 319
- service 320

classification

- add
 - usage 336
- assign
 - attribute 343
 - item 340
 - usage to an attribute 344
- create 334
- define
 - inheritable attribute fields 346
 - value 338, 339
- delete 350
 - value 349
- modify 335
- move
 - item 341
- remove
 - attribute 345
 - item 342
 - usage 337

context organization 19

- changing 19

customer entitlement

- add
 - customer profile criteria 282
- associate
 - generic customer group 279
 - specific customer 286
- create a rule 272
- define
 - without a customer 281
- dissociate
 - specific customer 288
- modify
 - customer profile criteria 284
- modify a rule 275
- remove
 - customer profile criteria 285
- remove a rule 278

E

entitlement

- create
 - customer entitlement 269
 - seller entitlement 290

- delete
 - customer entitlement 289
 - seller entitlement 299
- search
 - customer entitlement 270
 - seller entitlement 291
- test
 - customer entitlement 300

H

- home page 21
 - Favorite Searches panel 24
 - Recently Modified panel 24

I

- index
 - activate 230
 - delete 231
 - delete by date 232
 - generate new search index 228
 - incremental search index
 - generate 229
- initial configurations
 - configurable models 13
- item
 - add
 - alternative unit of measure 49
 - node 133
 - add instruction from existing instruction code 54
 - alias
 - associate 126
 - dissociate 127
 - alternative item association
 - associate a category 111
 - associate an alternative item 107
 - dissociate a category 113
 - dissociate an alternative item 110
 - alternative unit of measure
 - modify 51
 - remove 52
 - assets
 - associate an item 121
 - dissociate 123
 - modify 122
 - assign item
 - physical kit 173
 - assign values

- extended fields 71, 162
- associate
 - delivery service 167
 - provided service 163
 - return pickup service 170
- competitive item association
 - associate a category 118
 - associate a competitive item 114
 - dissociate a category 120
 - dissociate a competitive item 117
- create
 - bundle item 27
 - dynamic physical kit item 29
 - item with variation 30
 - physical kit item 28
 - regular item 26
- cross-sell association
 - associate a cross-sell item 79
- cross-sell associations
 - associate a category 83
 - dissociate a category 85
 - dissociate a cross-sell item 82
- define
 - alias 126, 127, 197, 198
 - fulfilment details for sourcing 58
 - fulfilment details for transporting 58
 - item classification 137
 - node-specific details 133
 - pricing unit of measure 48
 - unit of measure 47
- define item quantity
 - physical kit item 173
- define primary information 44
- delete 233
- dissociate
 - delivery service 169
 - provided service 166
 - return pickup service 172
- exclusion code
 - associate 128
 - dissociate 129
- keyword
 - associate a keyword 124
 - dissociate 125
- localize item description 46
- manage
 - category of associated supersession item 97, 99
 - merchandise 130, 193
 - sales details 130, 193

- manually add instruction 53
- modify
 - delivery service 168
 - provided service 165
 - return pickup service 171
- modify instruction 55
- modify sequence of instruction 56
- node
 - remove 136
- node details
 - modify 135
- preferred substitution association
 - associate a category 104
 - associate a preferred substitution item 100
 - dissociate a category 106
 - dissociate a preferred substitution item 103
- previewing details 181
- remove instruction 57
- remove item
 - physical kit 175
- search an item 33
- supersession associations
 - associate a category 97
 - associate an supersession item 93
 - dissociate a category 99
 - dissociate a supersession item 96
- up-sell associations
 - associate a category 90
 - associate an up-sell item 86
 - dissociate a category 92
 - dissociate an up-sell item 89
- variation item
 - add an existing item as a child item 41
 - modify a child item 42
- item attribute
 - assign
 - attribute value 64
 - assign multiple values
 - attribute value 69
 - manage
 - attribute value 66
 - modify
 - attribute value 67
- item returns
 - define
 - return fulfillment details to accept 61
 - return fulfillment details to decline 63

L

logging in 20

logical kit
creating 32

N

nontagged items
manage inventory 76

P

physical kit
assigning service 174
changing configuration model 179

S

saved search
adding to list of favorites 40
deleting 38
managing 38
renaming 38
viewing and executing 39

search
saving 37

seller entitlement
associate
organization 297
create a rule 293
dissociate
organization 298
modify
rule 295
remove
rule 296

service
add
asset 225
service activity for value-added service 182
add service options
delivery service 187
provided service 187
add service skill
delivery service item 189
associate
alias 197

- exclusion code 199
- keyword 195
- associate kitting and dekitting service
 - dynamic physical kit 191
 - physical kit 191
- associate service skill
 - provided service item 189
- competitive association 221
- create
 - delivery service 140
 - provided service 143
 - return pickup service 146
 - value added service 149
- cross-sell association 201
 - dissociate 204
- delete 234
 - asset 227
- dissociate
 - alias 198
 - exclusion code 200
 - keyword 196
- dissociate kitting and dekitting service
 - dynamic physical kit 192
 - physical kit 192
- dissociate service skill
 - delivery service item 190
 - provided service item 190
- instruction
 - manually add an instruction 157
- manage
 - alternate item association 224
 - instruction 159, 161
- modify
 - asset 226
 - service activity for value-added service 184
- primary information
 - delivery service 141
 - provided service 144
 - return pickup service 147
 - value-added service 150
- remove
 - service activity from value-added service 186
- remove item
 - physical kit 175
- remove service options
 - delivery service 188
 - provided service 188
- searching 153

T

tagged items
manage inventory 72

V

Visual Product Modeler 351
launching 351