

Oracle® Retail Advanced Inventory Planning
Order Management User Guide
Release 12.1

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Preface

The Oracle Retail Advanced Inventory Planning Order Management User Guide describes the application's user interface and how to navigate through it.

Audience

This document is intended for the users and administrators of Oracle Retail Advanced Inventory Planning. This may include merchandisers, buyers, and business analysts.

Related Documents

For more information, see the following documents in the Oracle Retail Advanced Inventory Planning Release 12.1 documentation set:

- *Oracle Retail Advanced Inventory Planning Release Notes*
- *Oracle Retail Advanced Inventory Planning Data Management Online - Online Help*
- *Oracle Retail Advanced Inventory Planning Data Management Online User Guide*
- *Oracle Retail Advanced Inventory Planning Order Management - Online Help*
- *Oracle Retail Advanced Inventory Planning Data Model Volume 1 Oracle Database Data Model*
- *Oracle Retail Advanced Inventory Planning Data Model Volume 2 Measure Reference Guide*
- *Oracle Retail Advanced Inventory Planning Installation Guide*
- *Oracle Retail Advanced Inventory Planning Operations Guide*
- *Oracle Retail Advanced Inventory Planning Implementation Guide*
- *Oracle Retail Advanced Inventory Planning Administration Guide*
- *Oracle Retail Advanced Inventory Planning Warehouse Replenishment Planning User Guide*
- *Oracle Retail Advanced Inventory Planning Store Replenishment Planning User Guide*

Customer Support

<https://metalink.oracle.com>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Review Patch Documentation

For a base release ("0" release, such as 12.0), Oracle Retail strongly recommends that you read all patch documentation before you begin installation procedures. Patch documentation can contain critical information related to the base release, based on new information and code changes that have been made since the base release.

Oracle Retail Documentation on the Oracle Technology Network

In addition to being packaged with each product release (on the base or patch level), all Oracle Retail documentation is available on the following Web site:

http://www.oracle.com/technology/documentation/oracle_retail.html

Documentation should be available on this Web site within a month after a product release. Note that documentation is always available with the packaged code on the release date.

Conventions

Navigate: This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement “the Window Name window opens.”

Note: This is a note. It is used to call out information that is important, but not necessarily part of the procedure.

This is a code sample
It is used to display examples of code

A hyperlink appears like this.

Welcome to Oracle Retail Advanced Inventory Planning

Oracle Retail Advanced Inventory Planning (AIP) is a suite of products designed to manage the supply chain needs of retailers, from interaction with their suppliers through various layers of warehouses down to individual stores and e-commerce sites. Oracle Retail Advanced Inventory Planning couples time-phased replenishment and allocation algorithms to produce an actionable receipt plan over time, based on demand forecasts, replenishment parameters, and inventory availability at the numerous points within the supply chain.

Oracle Retail Advanced Inventory Planning provides the tactical inventory plan needed to run the business. Its purpose is to optimally forecast consumer demand, source supply, and fulfill demand in a time-phased manner. Because of Oracle Retail Advanced Inventory Planning, the supply chain is aligned into a virtual enterprise, and the retailer gains visibility across the supply chain to demand, supply and any constraints.

Oracle Retail Advanced Inventory Planning is composed of two parts:

- Oracle Retail Data Management online (DMo)
- Oracle Retail Order Management (OM)

Using AIP

Getting Started

How you access AIP depends on how the application is set up at your location. Contact your system administrator for instructions. After starting the application, you are prompted to log in. Your system administrator assigns a user name and a temporary password. You will need to change the password after you log on the first time. Additionally, your password periodically expires, in a period of time as determined by your system administrator.

The following rules apply when you change your password:

- Passwords must be a minimum of six (6) characters and maximum of 128.
- Passwords must contain at least five different characters.
- Passwords must not be a simple.
 - Cannot include sequences such as ABCDE or ABCXYZ.
 - Cannot contain more than four consecutive characters.
- Passwords cannot be based on your user name or your full name.
- Passwords cannot be based on a previous password.
- Passwords cannot be based on a dictionary entry.

Logging on to Oracle Retail Advanced Inventory Planning (AIP)

1. On the Login window, enter your user ID in the User Name field.
2. In the Password field, enter your password.
3. Click **Log In**.
4. In the Applications area, click AIP Online. The User Console is displayed.

Note: The User Console may be displayed when you log in. If this is the case, proceed to the next step.

5. Select the application you want to use.
6. Click **Start**. The application opens in a new window.

Changing Your Password

1. Log on to Oracle Retail Advanced Inventory Planning (AIP).
2. On the User Console, click **Applications**.
3. Click **Change Password**.
4. In the Current Password field, enter the password you used to log in to the applications.
5. In the New Password field, enter the password you want to use in the future.
6. In the Retype password field, enter the password you entered in the New Password field.
7. Click **Change Password**.

Note: You can click the "Return to front page without changing password" link to cancel your changes.

Exiting AIP

1. Click **Exit**. You are returned to the User Console.

Note: The Exit button is located on the standard button bar in the AIP workspace.

2. Click **Log Out**.

The AIP Workspace

After logging into AIP, you have access to the application window. The primary elements in the application window appear in the image below:

- **A – Title Bar**
Located at the top of the application window. The title bar displays the product name and the area you are currently working in. The three buttons at the far right on the title bar allow you to minimize, restore, maximize, and close the application window.
- **B – Menu Bar**
Located below the title bar. The menu bar provides access to different areas of the application.
- **C – Primary Tabs**
Located at the top of the workspace. The primary tabs give you access to the functional areas available for the selections you made from the menu.

- D – Secondary Tabs
Located in the workspace, beneath the primary tabs. The secondary tabs give you access to the functional area within each primary tab, if they exist for a specific tab.
- E – Standard Buttons
Located at the left of the workspace. The standard buttons are enabled based on the work you have done or the selections you make in the workspace.

Navigating AIP

The basic method for entering data in a text field is to type the text in the field. Some fields are restricted, however, as to the type of data that may be entered. The options for entering or selecting data depend on the type of data that may be required or permitted in the field. For example, some fields permit only numeric data, while others permit only alphabetic or alphanumeric data. Some fields require a date to be entered in a specific format. Some fields permit only one value, while others permit multiple values.

Calendars, drop-down lists and lists of value provide you with access to preformatted, predefined values. Instructions for using these tools are provided below.

Using a Calendar Button

To look up the date, you can access a date picker window.



Date Picker Window

Select a Date

1. Click the calendar button next to a date field. The calendar window opens.

Note: The calendar button appears as a drop down button to the right of the date field.

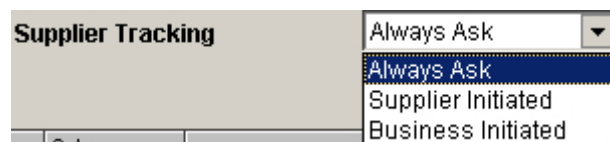
2. Select the desired date:
 - To select a year, press the left or right arrows next to the year field.
 - To select a month, click on the appropriate month abbreviation.
 - To select a day of the month, click the day on the calendar.
3. Click **OK**. The date field is automatically filled in when you select the day of the month.

Move the Date

You can move the selected date forward or backward.

Using a Drop-down List

Some fields are restricted to a predefined list of values. You access a drop-down list from which you can pick the desired value.



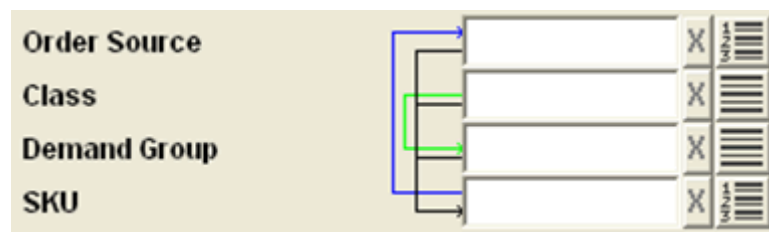
Drop-down List

1. Click on the drop-down button next to a field. A list of predefined values appears.
2. If necessary, scroll through the list until the appropriate value appears.
3. Select the value. The field is automatically filled in with the selected value.

Field-Level Filtering in AIP

Some fields are filtered by the selections you have made in previous field. These fields are indicated by arrows pointing to them from other fields.

Note: Any fields that are required when searching are indicated with an asterisk (*).



Example of Field Level Filters

In the example

Field Name	Results in Limits to	Indicated By
Order Source, Class, and Demand Group	SKU	Black arrow
Class	Demand Group	Green arrow
SKU	Order Source	Blue arrow

Note: The colors indicated are specific to this example. The arrows in the window you are working in may be colored differently and serve only to help you distinguish the different lines.

Clear a Selection

After you make a selection, the clear LOV  button is enabled. If two fields filter each other as part of a field-level filter, you must clear your selections before you can make additional selections.

To clear the field, click the clear LOV  button.



Locked Filter Field

Sorting Rules

When certain elements are selected, related fields are filtered to only display data corresponding with the selected element. The following sections detail the impact of selection on these related fields.

Demand Group

When Demand Group is selected, the following field is filtered:

- SKU – Filtered to only display SKUs having a pack size in the selected demand group.

Profile

When Profile is selected, the following field is filtered:

- Class – Filtered to only display classes containing a SKU assigned to the selected profile.

SKU

When SKU is selected, the following fields are filtered:

- Demand Group – Filtered to only display demand groups containing a pack size of the selected SKU.
- Order Source – Filtered to only display suppliers that supply a pack size of the selected SKU, and warehouses that are ranged for a pack size of the selected SKU.

Class

When Class is selected, the following fields are filtered:

- Demand Group – Filtered to only display demand groups containing a SKU belonging to the selected class.
- SKU – Filtered to only display SKUs belonging to the selected class.

Supplier

When Supplier is selected, the following fields are filtered:

- Demand Group – Filtered to only display demand groups containing a SKU pack size that is supplied by the selected supplier.
- SKU – Filtered to only display SKUs having a pack size supplied by the selected supplier.
- Class – Filtered to only display classes containing a SKU that has a pack size supplied by the selected supplier.

Order Source

When Order Source is selected, the following field is filtered:

- SKU – If the selected order source is a supplier, SKU is filtered to only display SKUs having a pack size supplied by the supplier. If the selected order source is a warehouse, SKU is filtered to only display SKUs having a pack size ranged to the warehouse.

Store Format

When Store Format is selected, the following field is filtered:

- Store – Filtered to only display stores of the selected store format.



Warehouse

When Warehouse is selected, the following field is filtered:

- SKU – Filtered to only display SKUs that are ranged to the selected warehouse.

List of Values (LOV) Buttons


Some fields need to filter a large amount of information. To help you select the information, there are two types of LOV buttons:

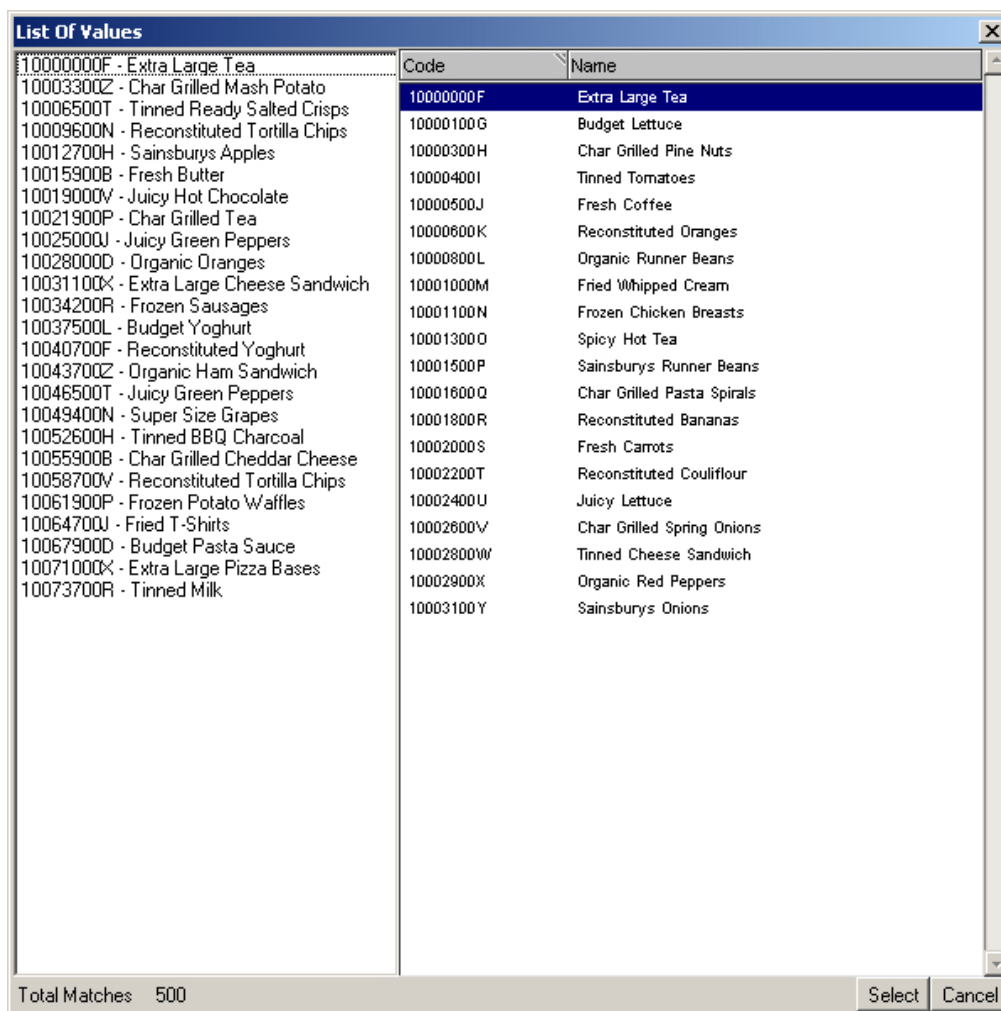
- **LOV  buttons:** Allow you to pick from a list of valid data that can be used in the field. A LOV button only allows you to make one selection.
- **Multi-select LOV  buttons:** For fields that permit multiple values, you can access a list of value window in multi-select view. The box contains two blocks. One block contains the predefined values that are available to you. The second block contains the values that have already been assigned to the field, if any. You have the option of:
 1. Removing assigned values, which places them back in the available list.
 2. Adding values, which places them in the selected list.

When a multi-select LOV button has multiple values selected, the first value that was selected is displayed followed by and ellipse.


The list of values window displays the first set of 20 values and a paging mechanism. To view additional sets of information, select from the list on the left side.

Using a LOV Button

1. Click the LOV  button next to a text field. The list of values window opens. The total number of values appears on the footer of the window.



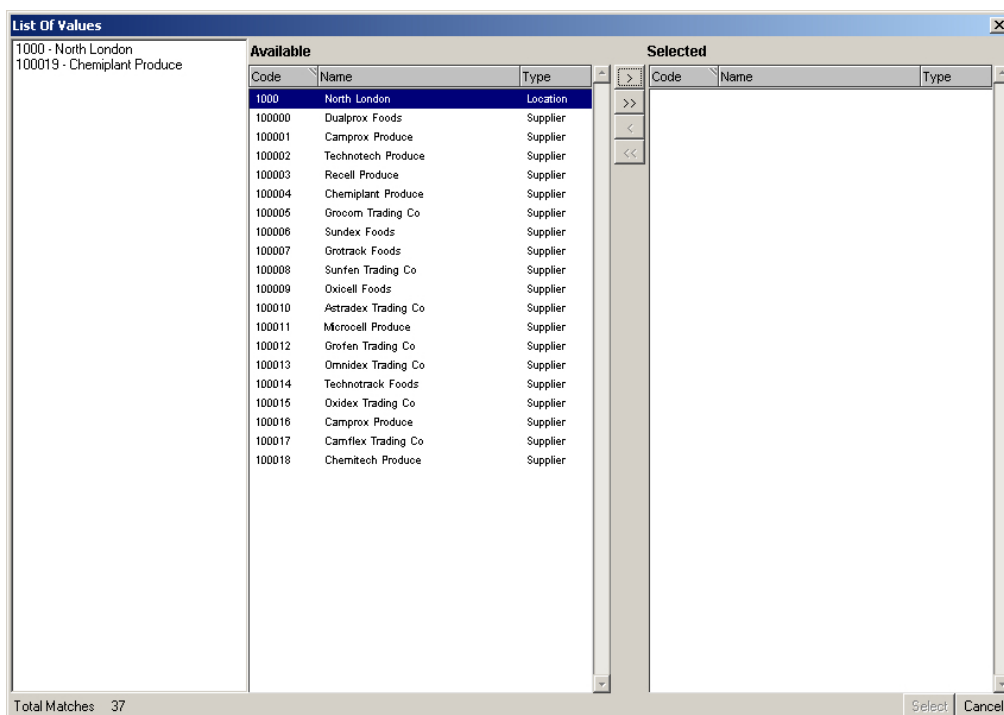
List of Values Window

Note: You can enter information into the field before you click the LOV  button. A partial list of values is return that matches the information you entered. If you enter a complete, valid value and press Enter, the information is displayed without opening the list of values window.


2. Select a value. Page as necessary to find your value.
3. Click **Select**. The field is automatically filled in with the selected value.


Using a Multi-Select LOV Button

1. Click the multi-select LOV  button next to a text field. The list of values window opens. The total number of values appears on the footer of the window.





List of Values window - multi-select view

Note: You can enter information into the field before you click the multi-select LOV  button. A partial list of values is return that matches the information you entered. If you enter a complete, valid value and press Enter, the information is displayed without opening the list of values window.

2. Select the appropriate values:
 - Select one or more values in the selected values box. Page as necessary to find your value.
 - Click the move right  button. The values are displayed in the selected values box.

Note: To move all values displayed in the available area, click the move all right  button.

3. Remove unneeded values:
 - Select one or more values in the selected values box.
 - Click the move left  button. The values are removed from the selected values box

Note: To move all values displayed in the selected area, click the move all left  button.


4. Click **Select**. The field is automatically filled in with the selected values.


Transfer Boxes


For fields that permit multiple values, you can use a transfer box. The box contains two blocks. One block contains the predefined values that are available to you. The second block contains the values that have already been assigned to the field, if any. You have the option of


1. Removing assigned values, which places them in the available list.
2. Adding values, which places them in the selected list.

Using a Transfer Box

1. Select the appropriate values:
 - a. Select one or more values in the available values box.
 - b. Click the move right  button. The values are moved to the selected values box.

Note: To move all displayed values, click the move all right  button.

2. Remove Unneeded Values:
 - a. Select one or more values in the selected values box.
 - b. Click the move left  button. The values are returned to the available values list.

Note: To move all displayed values, click the move all left  button.

Moving Top Level Folders and Folder Components

- Select the top level folder to move the folder and all components contained within the folder.
- Select the individual component of the folder to move the folder component without including the entire folder.

Sorting a Table

In a table you can sort the results:

- To sort the list, click any column heading. Hatch marks indicates the column that is currently sorted, as well as the order: ascending or descending.
- To reverse the current sort order, click the same column heading again.
- To sort on multiple columns, where allowed, click the column heading to select the sort order and then right-click the column heading. The column heading turns red to indicate the column is locked. Repeat this process for other columns displayed on screen.

Alert Status	Alert	Priority	Alert Type	Alert Date
Closed	A source split was assigned to a single source when more than one source exists for: Effective Date 11-APR-06, Source 100139, Demand Group 100556 , 2		New Source Split	04/12/2006

Example of Table Data Sorted by Multiple Columns - Alert Status and Priority





Paging through Records

On some tabs, like the Alerts tab where numerous records may be displayed, paging controls appear at the bottom of the tab. This feature allows you to page through the records as needed. The total number of pages appears to the left of the paging controls.



Example of Paging Controls

Using the Paging Controls

- To page forward, click the Next  button. The next page of records appears.
- To page backward, click the Previous  button. The previous page of records appears.
- To view the first page of records, click the First Page  button. The first page of records appears.
- To view the last page of records, click the Last Page  button. The last page of records appears.

Using the Online Help

Welcome to the online help for Oracle Retail Advanced Inventory Planning.

About the Online Help

The online help system uses JavaScript for some of its functionality. Make sure you have enabled JavaScript for your Web browser. Refer to the online help in your Web browser for instructions on enabling JavaScript.

Introduction

This help site provides step-by-step procedures as well as other information about using Oracle Retail Advanced Inventory Planning. We have implemented some tools to assist your navigation of this help site. This page explains these tools.

Formatting Conventions

This section provides information about the documentation conventions used in the online help.

Note: Notes are displayed using this convention. Notes contain additional information about the process or procedure that you are performing.

Navigate: The navigation sections of a procedure provides information about how to access the window that is the starting point of a procedure.

Navigating the Online Help

This help site provides several ways for you to navigate to your topic.

Using the Table of Contents

The table of contents is the most common way that you will navigate to your topic.

1. Select the **Contents** tab to display the table of contents on the left side of your screen.
2. Double-click on a book to expand it and view the topics.
3. Select a topic from the table of contents to view it.

Using the Search Feature

Use the search feature to explore the contents of your topics and find matches to queries that you define. There are some basic rules for making queries in full-text searches.

- You can type your search in uppercase or lowercase characters. Searches are not case sensitive.
- You can search for any combination of letters (a-z) and numbers (0-9).
- Punctuation marks such as the period, colon, semicolon, comma, and hyphen are ignored during a search.
- Group the elements of your search using double quotes or parentheses.
- You cannot search for quotation marks.

Follow this procedure to use the search feature.

1. Select the **Search** tab to display the search feature on the left side of your screen.
2. In the Search field, enter the word or words that you want to find.
3. Press the Enter key. Topics that match your search criteria display in the left pane.
4. Select a topic to view it

Order Management

Introduction to Oracle Retail Order Management

Order management allows you to create, edit, and view orders from suppliers and warehouses. An order can be a purchase order or a transfer.

- **Purchase orders** are orders sourced directly from suppliers.
- **Transfers** are orders sourced directly from a warehouse.

Orders exist in Order Management as a result of the following processes.

- You can manually create a purchase order in order management.
- Orders are automatically generated by AIP.

Order Quantities

When you create or edit an order, there are several rules that apply to the quantity you enter:

- The quantity must be greater than zero.
- You must order a full case or SKU-pack size.
- If you use eases as your order quantity, you must order multiples of a full SKU-pack size.

Note: As best practice, Oracle Retail recommends ordering in quantities that complete the pallet/order multiple. If you order a quantity that is not a valid pallet/order multiple, you will receive a warning.

Security

You are assigned permissions to the windows in Order Management by your system administrator. The windows and buttons that are available depend on your system settings. Contact your system administrator for details.

Create an Order

The Order Creation window allows you to manually create into-store and into-warehouse purchase orders. When you create purchase orders, you can enter quantities as cases or eases.

After you create a purchase order, the purchase order is displayed on the table in green until it is saved.

Once you save a purchase order, it is:

- Validated against the destination's order cycle.
- Validated for the destination's ability to receive.
- Verified for valid release dates.
- Released immediately to the merchandising system.

Conditions to Create a Purchase Order



The following conditions must be met before you can create a purchase order for a warehouse:

- A delivery group must exist in AIP for the supplier, destination, SKU-pack, and delivery date.
- The source of the order must be a supplier.
- The warehouse selected for the purchase order has a chamber in either release or closing down status and the warehouse is ranged for the SKU type.


Create a Purchase Order

Navigate: Log into Order Management. Select the Order Creation tab.

Order Creation Tab

1. In the Delivery Date field, select the date you want the order delivered.
2. In the Supplier field, enter a supplier ID, or click the LOV  button and select the supplier.
3. In the Destination field, enter the destination ID, or click the LOV  button and select a destination from the list.

Note: All destinations with ranged or on-supply SKU pack-sizes from the supplier are displayed.

4. In the SKU Pack Size field, enter the SKU pack-size you want to order, or click the LOV  button and select a SKU pack size from the list.
5. In the Unit of Measure area, select how you want to enter the order quantity for this purchase order.

6. Click **Create**. This populates the table with the purchase order information.

Note: An unsaved order with the same supplier, destination, SKU-pack, and delivery date cannot be duplicated.

7. In the Quantity field, double-click the column to enter the quantity for the purchase order.

Note: If you are ordering by eaches, you must enter multiples of the pack size.

8. To delete an unsaved purchase order:
 - a. Select the order.
 - b. Click **Delete**. The purchase order is removed from the table.
9. Click **Save**. You are prompted to confirm your decision.
10. Click **OK**. An order number is assigned to your purchase order.

Maintain Orders

The Order Maintenance window allows you maintain, cancel, and release purchase orders for:

- Into-store orders
- Into-warehouse orders

Into-store and into-warehouse orders are displayed in Order Management if they are created manually or are automatically generated by AIP. The orders can be purchase orders or transfers, with received or un-received quantities. On the Order Maintenance window, the pallet/order multiple for the order is displayed in the lower right corner of the window when you select an order.

Any purchase orders with unsaved changes are displayed in green. Once you save a purchase order, your changes are immediately communicated to the merchandising system.

About Maintaining Your Orders

The AIP Online system can be configured to limit the functions a user can perform from the Order Maintenance tab. Based on the AIP configuration implemented at your location, the following functions may not be allowed or may be limited:

- The ability to move un-received quantities of an order.
- The ability to move un-received order quantities if the line item has an open order status and either a) the received quantity is less than the total quantity or b) the received quantity is zero.
- the ability to change the order destination when moving order quantities.
- The ability to input or require a new order number when moving an order. If a new order number is not required, users are allowed to choose whether to retain the existing order number or generate a new one when moving un-received order quantities.
- The ability to cancel un-received order quantities.
- The ability to release unreleased orders.
- The ability to edit the quantities or purchase orders.
- The ability to view all orders. The screen may only display purchase orders, only transfers, or both purchase order and transfers.

This section provides the procedures to perform all tasks available through the Order Maintenance tab, but the tasks you can perform or the options displayed on your system may vary based on your system configuration.

Purchase Orders

When you edit an open or overdue order, you can move the un-received quantity on a purchase order, so that the un-received quantity arrives on a new date or to a new destination. Alternatively, you can edit any un-received quantity on the purchase order. You cannot move a purchase order that has been completely received.

To cancel un-received quantities, your purchase order must be open or overdue. Additionally, the purchase order cannot be fully received.

Release a Purchase Order

You can manually release purchase orders that are forecasted. Once you release a purchase order, it is:

- Verified that the warehouse selected for the purchase order has a chamber in release or closing down status and the warehouse is ranged for the SKU type.

Note: This verification occurs only for warehouse destination types.

- Assigned an order number.
- Released immediately to the merchandising system.

Move a Purchase Order

The following conditions when you move a purchase order with a warehouse destination type:

- A delivery group must exist in AIP for the supplier, destination, SKU-pack, and delivery date.
- The new warehouse selected for the purchase order has a chamber in release or closing down status and the warehouse is ranged for the SKU type.

When you are working with purchase orders, to retain a purchase order number you must select the entire order. To do so, in your search criteria you must:

- Select the Entire Order, and Tree view. On the results table, select the folder.
- Select the Entire Order and Grid. To retain purchase orders at this level, your system settings must be set up to define order numbers at the order source, destination, SKU-pack, and delivery date.
- Select the Matching Line Item and Grid. To retain purchase orders at this level, your system settings must be set up to define order numbers at the order source, destination, SKU-pack, and delivery date.

The status of a purchase order can provide you with various types of information. Purchase orders can exist in several statuses:

- **Open:** The order has been released.
- **Overdue:** The order has received less than the total order quantity and the delivery date has passed.
- **Closed:** The merchandising system has set the status to closed.

Transfers

Transfers can only be viewed from the Order Maintenance window. You cannot edit, release, or move the dates or destinations of a transfer.

Search for Orders

Navigate: Log into Order Management. Select the Order Maintenance tab.

Order Management - Order Maintenance

Order Review | Order Creation | **Order Maintenance**

Order Type: All
Display Results: Entire Order
Release Status: All
Order Status: All
Supplier Tracking: Always Ask

Unit of Measure: ☒ Cases ☐ Eaches
Update Quantity: ☒ Total ☐ Unreceived
View: ☒ Standard ☐ Extended

Delivery Date	Order Number	Order Status	Destination	Supply Source	SKU	Pack	Total Quantity	Received Quantity
02/08/2005	90000898	Open	4003_2102 - Biggleswade PCC	100029 - Oxicleaf Produce	00100442 - Char Grilled Chili	1	30	0

☐ Expand All Pallet/Order Multiple

Order Maintenance Tab

1. Click **Select Search Criteria**. The Select Search Criteria window opens.

Select Search Criteria Window

2. Enter your search criteria as necessary, choosing one of the following options:
 - a. Order Number. No other criteria required.
 - b. Select one option from each column in the table below:

Select one of the following:	AND	Select one of the following:
Order Source and Destination		Release Dates Note: Available dates are limited by the order purging period and release status selections.
Order Source and Destination Type (Any selection except all)		Delivery Dates Note: Available dates are limited by the order purging period and release status selections.
SKU		Order Status Note: This field is available only if you have selected Released in the Release Status area.

3. You may select additional information to limit your search:
 - **Display Results:** Select how you want to view the results:
 - Matching Line Items returns line items that meet the search criteria.

- Entire Order returns orders that contain the line items that meet the search criteria.
 - **Display Format:** Select how you want to view the results:
 - Tree to display the line items under the common order number.
 - Grid to display the line items in a table format.
4. Click **Search**.

Edit a Purchase Order Quantity

Navigate: Log into Order Management. Select the Order Maintenance tab.

1. Search for and retrieve a purchase order.

Note: If you are working in a tree structure, double click the folder to display the line items contained in the purchase order.

2. In the Quantity field, double click on the quantity number to enter the quantity for the order.

Note: The Quantity column is determined by the view selected in the Update Quantity area. For more information, see the Change display setting of orders procedure.

3. Save your purchase order.

Change the Display Settings of Orders

Navigate: Log into Order Management. Select the Order Maintenance tab.

1. Search for and retrieve a purchase order.

Note: If you are working in a tree structure, double click the folder to display the line items contained in the order.

2. In the grid view of the search table you can sort the results:
- To sort the list, click any column heading. Hatch marks indicates the column that is currently sorted, as well as the order: ascending or descending.
 - To reverse the current sort order, click the same column heading again.
 - To lock the column that has been filtered, right click on the header. It turns red.

Note: Once you lock a column, you can sort additional column by clicking on the appropriate column header.

- To unlock the column, right-click it again.
3. In the Unit of Measure area select:
- **Cases** displays the order quantity in cases.
 - **Eaches** displays the order quantity in eaches.
4. In the Update Quantity area, select:
- **Total** displays the total order quantity and enables you to edit the total quantity.
 - **Un-received** displays the un-received quantity and enables you to edit the un-received quantity.
5. In the View area, select the view you want to use to display the following columns:

Standard	Extended
Delivery Date	Delivery Date
Order Number	Order Number
Order Status	Order Status
Destination	Destination
Order Source	Order Source
SKU	Class
Pack	SKU
Quantity (Total/Un-received)	Pack
Received Quantity	Quantity (Total/Un-received)
	Received Quantity
	Supplier Tracking
	Release Date

6. If you are working in tree view, select the Expand All check box to view all line items in all orders.

Move an Un-received Order

Navigate: Log into Order Management. Select the Order Maintenance tab.

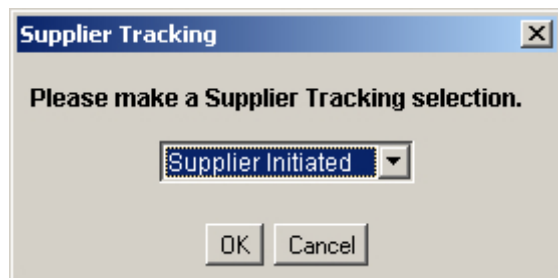
1. Search for and retrieve a purchase order.

Note: If you are working in a tree structure, double-click the folder to display the line items contained in the order.

2. Select what you want to move:
 - Select the line items of an order you want to move.
 - Select the entire purchase order.

Note: All line items must meet the receive criteria in order to move the purchase order.

3. Click **Move Un-received**. The Supplier Tracking window opens.



Supplier Tracking Window

Note: This window opens only when Always Ask is selected in the Supplier Tracking field in the Order Maintenance window.

4. Enter Supplier Tracking selection.
5. Click **OK**. The Move Un-received Quantity window opens.

Move Unreceived Quantity

Supplier Tracking: Supplier Initiated
Unit of Measure: Cases

Selected Orders

Delivery Date	Order Number	Destination	Supplier	SKU	Pack	Unreceived Quantity
02/08/2005	90000868	4003_2102 - Biggleswade PCC	100029 - Oxiclean Produce	00100442 - Char Grilled Chilli	1	30

Move unreceived quantity to:

☒ Delivery Date: [Date Field]

☐ New Destination

Destination Type: [All]


* Destination: [None]

Order Number

☒ Retain existing order number
☐ Generate new order number

[Save] [Cancel]

Move Un-received Quantity Window

6. To change the delivery date of the un-received quantity:
 - a. Select the Delivery Date check box.
 - b. In the next field, select the new date using the calendar button.
7. To change the destination of the un-received quantity:
 - a. Select the New Destination check box.
 - b. In the Destination Type field, select the type of location receiving the quantity.
 - c. In the Destination field, enter the Destination ID, or click the Destination LOV  and select a destination.
8. In the Order Number area select:
 - a. Retain existing order number to use the same order number for the new order.
9. Click **Save**. You are prompted to confirm your decision.
10. Click **OK**. Your order is saved.

Note: This option is only available if the entire purchase order was selected in the Order Maintenance window.

- b. Generate new order number to create a new order number.

Note: Once you confirm your decision to save, the original purchase order or line item is closed and can no longer be updated.

Cancel Un-received Quantities on a Purchase Order

Navigate: Log into Order Management. Select the Order Maintenance tab.

1. Search for and retrieve a purchase order.

Note: If you are working in a tree structure, double click the folder to display the line items contained in the purchase order.

2. Select the line items or orders that you want to cancel.

Note: All line items must meet the receive criteria in order to move the purchase order.

3. Click **Cancel Un-received**. You are prompted to confirm your decision.
4. Click **OK**. Your order is displayed in green and must be saved.

Release a Forecasted Purchase Order

Navigate: Log into Order Management. Select the Order Maintenance tab.

1. Search for and retrieve an unreleased purchase order with Forecast in the Order Number field.

Note: If you are working in a tree structure, double click the folder to display the line items contained in the purchase order.

2. Select the line items or purchase orders that you want to release.

Note: All line items must meet the receive criteria in order to move the purchase order.

3. Click **Release Order**. You are prompted to confirm your decision.
4. Click **OK**. Your order is displayed in green and must be saved.

Save a Purchase Order

Navigate: Log into Order Management. Select the Order Maintenance tab.

1. Search for and retrieve a purchase order.
2. Complete your work with the purchase order.
3. Click **Save**.

Note: If you have modified a released order and selected Always Ask, the Supplier Tracking window opens

4. In the Supplier Tracking field select:
 - **Supplier Initiated** indicates that order changes were caused by the supplier.
 - **Business Initiated** indicates that order changes were caused by the retailer.

Note: This window opens if you have not already specified supplier tracking in the Order Maintenance window.

5. Click **OK**.

Review Orders

The Order Review tab allows you to review release and unreleased into-store and into-warehouse orders. Orders are available for review until they are a specified number of days past their release or delivery date. Your system administrator specifies the number of days that orders remain available.

Visual clues will help you understand the order status:

- **Quantities in parenthesis:** The purchase order is unreleased. If multiple orders are represented, the quantity displayed is the unreleased amount across purchase orders.
- **Quantities in brackets:** For multiple orders, indicates that released and unreleased quantities exist across purchase orders.
- **Quantities in red:** The purchase order is overdue.

You can review existing orders in Order Management through the Order Review window. The window displays time from left to right across the window. The time periods displayed are determined by your selection in the Select Search Criteria window. You can change the data displayed in the table by updating the information selected in the dynamic fields located in the upper left corner of the window. When you select a cell, information about the order is displayed below the table. Quantities displayed may apply to a single order or multiple orders.

Search results are displayed in numeric order as a result of your selection in the Display in Rows field on the Search Criteria window. The table rows provide a view to the destination, order source, or the SKU-pack size on the order over the period of time you select.

After you search, you may focus your search by selecting a cell and redefining your search by date. This allows you to perfect your search and examine the orders at an appropriate level.

Note: The AIP Online system can be configured to limit the type of orders user can view. Based on your system configuration, the screen may only display purchase orders, only transfers, or both purchase order and transfers. This section provides the procedures to perform all tasks available through the Order Review tab, but the tasks you can perform or the options displayed on your system may vary based on your system configuration.

Search for Orders and Transfers

Navigate: Log into Order Management. Select the Order Review tab.

Order Management - Order Review

Order Review | Order Creation | Order Maintenance

Create
Edit
Delete
Search
Display
Clear Criteria
Clear Results
Clear All
Apply
Save
Refresh
Help
Exit

Order Source: V5678900000 - The Furniture Company P/L
SKU Pack Size:
Display Quantity:
Display Zero Values: No
Order Type: Purchase Order
Unit of Measure: ☒ Cases ☐ Eaches

Destination	10/02/2006	10/03/2006	10/04/2006	10/05/2006	10/06/2006	10/07/2006	10/08/2006	Total
Total	0	0	0	0	0	0	0	0

Order Number
Supplier Tracking
Received Quantity
Last Modified By

Previous Next

Order Review Tab

1. Click **Select Search Criteria**. The Select Search Criteria window opens.

Select Search Criteria Window

2. Enter criteria as necessary to retrieve orders

Field	Description
Order Source	Select the origin of the items on the order.
Class	Select the type of SKUs on the order.
Demand Group	Select the demand group you want to search by.
SKU	Select the SKU on the order.

Note: You must select criteria in one of the above fields and at least one destination.

3. In the Available Destination area:
 - Select the destinations you want to view orders and transfers for:

- Click the move right button to move the destination to the Selected Destinations area.
- Click the move all right arrow button to move all destinations to the Selected Destinations area.

Note: If you do not want a location that is in the Selected Destinations area, use the move left button or move all left button.

4. In the Display in Rows field, select the information you want displayed in the rows of the table:
 - **Destination:** The warehouse or store the order arrives to.
 - **Order Source:** The origin of the order.
 - **SKU Pack Size:** The item on the order.
5. In the Display Time area, select the time period you want displayed for the orders
 - In the field to the right of the display time select the date or month you want the time period to start from
6. In the Display Quantity field, select the type of quantity you want displayed in the quantity field.
7. Select the Display Zero Values check box to view zero quantities.

Note: For easier viewing, you may choose not to view zero quantities.

8. In the Order Type area, select what you want to view:
 - **All:** Both orders and transfers are displayed.
 - **Orders:** Only orders that have a supplier as a source are displayed.
 - **Transfers:** Only orders that have a warehouse as a source are displayed.
9. Click **Search** to display the orders that match the initial results.

Refine Your Search Results

Navigate: Log into Order Management. Select the Order Review tab.

1. Search for orders and transfers.
2. Select a order quantity on the table.
3. Click **Select Search Criteria**. The Select Search Criteria window opens.
4. Refine your search results as necessary. Information displayed in the date fields is determined by the cell selected in the table.
5. Click **Search** to display the new orders that match the initial results.

View Orders and Transfers

Navigate: Log into Order Management. Select the Order Review tab.

1. Search for orders and transfers.
2. In the dynamic fields, use the arrows or drop-down arrow to select the supplier you want to view orders for.

Note: The fields contain Destinations, Order Sources, or SKU-pack Sizes, depending on your selection in the Display in Rows field on the Select Search Criteria window.

- Click **Display** to view matching order information.
- 3. To view additional dates:
 - Click **Next** to view dates after the dates currently displayed.
 - Click **Previous** to view dates before the dates currently displayed.
- 4. In the Unit of Measure field, select the appropriate measure to view the quantities.
- 5. To view order details for multiple orders:
 - a. Select an order quantity with multiple orders
 - b. Double-click the order quantity. The Multiple Orders window opens.

Data Management Online - Warehouse - Warehouse Ordering

Warehouse Store General

Create Edit Delete Search Display Clear Criteria Clear Results Clear All Apply Save Refresh Help Exit

Order Cycle: Time Balanced Order Source Splits

Non Order/Non Delivery Days: Location Orderable Units

Scheduling Location Calendar: Supplier Locks

Order Groups

Effective Date: 01/05/2007

Demand Group: 100035032A - MONITOR,CRT,A91F+, ULTRA BRIGHT

Available Destination Warehouses

- 4501 - AIP Virtual WH
- W10001 - VW for Physical WH1
- W1090 - AIP MINNEAPOLIS CSC
- W111111112 - Cent. Mkt WH 7
- W111111113 - Cent. Web WH 8
- W111111114 - Cent. Catalog WH 9
- W111111115 - Cent. VM WH 10
- W1170 - AIP HAMILTON CSC
- W20001 - VW for Physical WH2

Selected Destination Warehouses

- W1105 - AIP CHICAGO CSC

Displayed Destination Warehouse W1105 - AIP CHICAGO CSC

Order Source	Type	Displayed Split %	New Split %
L690 - MEADOWS VACO	Supplier		100
4501 - AIP Virtual WH	Warehouse		
W10001 - VW for Physical WH1	Warehouse		
W1090 - AIP MINNEAPOLIS CSC	Warehouse		
W1091 - AIP DETROIT CSC	Warehouse		
W1105 - AIP CHICAGO CSC	Warehouse		NA
W111111112 - Cent. Mkt WH 7	Warehouse		
W111111113 - Cent. Web WH 8	Warehouse		
W111111114 - Cent. Catalog WH 9	Warehouse		
W111111115 - Cent. VM WH 10	Warehouse		
W1170 - AIP HAMILTON CSC	Warehouse		
W20001 - VW for Physical WH2	Warehouse		
W2091 - AIP WH for SW_Vmua	Warehouse		
W2096 - AIP LANSING, IL	Warehouse		
W2071 - AIP GROVE CITY, OH	Warehouse		
Total			100

Reset Order History

Multiple Orders window

- c. Click **Close** to return to the search results.

Edit and View Order Details

Navigate: Log into Order Management. Select the Order Review tab.

1. Search for orders and transfers.
2. Select an order / transfer quantity.
3. Click **Go to Order Detail View**. The Order Maintenance tab opens with your order displayed.

Note: You must have security permissions to edit or view an order on the Order Maintenance window.

4. Edit or view the order as necessary.