Sterling Supplier Portal

Partner User Guide

Documentation Date: 10 June 2014

Contents

Chapter 1. Introduction to IBM Sterling Supplier Portal

Sponsors are organizations that buy products from Partners. Sponsor are also known as Buyers. Partners are organizations that supply products to Sponsors. Partners are also known as Suppliers.

IBM® Sterling Supplier Portal enables you to conduct electronic business as part of a Web trading community. As a Sterling Supplier Portal Partner, you can perform various tasks such as configuring your organization, creating and managing users, modifying your own public profile, and viewing the community with the corresponding Sponsors, generating and printing Packing Slips, and updating inventory information.

Partners receive an invitation from the Sponsors to join their community. Based on the community configuration a Partner can send acknowledgements, Advance Shipment Notifications, and invoices for the shipped quantity.

Configure Dashboard

The Sterling Supplier Portal Dashboard enables you to view a summary of the data pertaining to the on-boarding processes.

The Sterling Supplier Portal Dashboard is the first screen that is displayed when you log in. The data is displayed in panels.

You can configure the Dashboard to display the Overview, Next Tasks, Overdue Tasks, and Open Orders. The Dashboard provides an updated snapshot of those aspects of on-boarding that are most pertinent to your company.

One of the advantages of the Dashboard is that you can configure it to display the details you want to view often. You can select Dashboard panels based on the applications you have subscribed to.

Create Documents

Sterling Supplier Portal enables you to create various types of documents such as acknowledgements for orders, Advance Shipment Notices, invoice for orders and so on.

Using Sterling Supplier Portal you can:
- Send Acknowledgements for the orders and the Change POs received.
- Send Advance Shipment Notifications for orders.
- Send Invoices for orders and Advance Shipment Notifications.

View Documents

Sterling Supplier Portal enables you to search and view the details of orders, shipments, and invoices.

You can also create Acknowledgements, Shipments, and Invoices if these are a part of the choreography.

Note: When Sponsors configure their community as a Web community, they must select a sequence of Electronic Data Interchange (EDI) documents to set the rules for their community. This sequence of EDI documents is termed as the *choreography* for that community.

View Agreements

An agreement is a documented understanding between the corresponding parties. Sterling Supplier Portal enables you to view the details of the agreements pertaining to your organization.

Perform Setup Tasks

Sterling Supplier Portal enables you to perform various setup tasks such as configuring your profile, managing items and item rules, and updating inventory information.

Chapter 2. Service Agents

Sterling Supplier Portal supports the concept of Service Agents, which are third party vendors. The Service Agents are companies or individuals that supply products to the sponsors and handle multiple suppliers.

A sponsor can have more than one Service Agent that caters to a group of suppliers. In Sterling Supplier Portal, the sponsor company is the parent company of a Service Agent. The Service Agent can view the chargeback data and the related documents for all the suppliers pertaining to it. A Service Agent is onboarded in the same way as a partner, although some additional configuration must be performed to enable the partner as a Servicing Agent. For this, you must contact IBM support.

The following diagram displays the hierarchy for setting up a Service Agent in Sterling Supplier Portal.
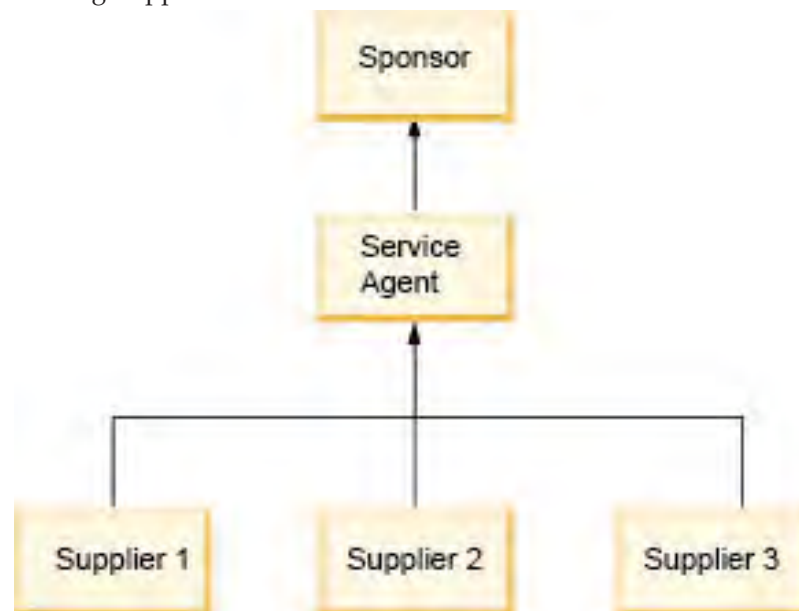
The following rules apply to Service Agents:

- A Service Agent can have only one sponsor.
- A sponsor can have multiple Service Agents that each work with a different set of suppliers.
- When a chargeback alert is received and the Service Agent opens the chargeback alert first, the alert is not displayed in the dashboard for the suppliers that work with the Service Agent.
- A Service Agent can only view the chargeback details for their suppliers.

Chapter 3. EDI Capable Suppliers

EDI capable suppliers can use Sterling Supplier Portal for the Vendor Compliance feature.

They can register as partner to a Chargeback Only community and can access their chargeback and the supporting documents as well as review the non-compliance summary report.

Note:

- An EDI capable supplier can either be a member of a Chargeback Only community or a Non-Chargeback Only community for the same Sponsor at the same time.
- An EDI capable Partner registered as a Chargeback Only community can only view the order, shipment, and invoice details. The Partner cannot perform any of the related tasks pertaining to an order, shipment, and invoice.
- The Dashboard for EDI capable suppliers displays only the New Communications panel and New Messages panel by default. The **My Documents** menu displays only the Chargebacks command.

Chapter 4. Using Sterling Supplier Portal For the First Time (Partner Task)

Partners can use Sterling Supplier Portal to conduct business with your sponsors through a Web trading community.

A Sponsor company creates a community and then invites you to join its community. You can become a member of two different communities, owned by the same or different Sponsors, if you have received invitations to these communities. The Sterling Supplier Portal application Home page is the first screen that is displayed when you log in to Sterling Supplier Portal. Alternatively, you can also click the **Home** hyperlink to view the Home Detail screen, which enables you to view the Dashboard, and the Application Links, Menu Tabs, and Panels. When performing specific tasks on other screens, you can click the **Home** hyperlink to view the Home page.

As a Sterling Supplier Portal Partner, you have many features and capabilities available to you. First you need to accept the Sponsor's invitation and join the community.

After becoming a member of the Sponsor's community, log in to Sterling Supplier Portal as a Partner and you can use the following workflow to begin using the application effectively:

1. Configure the Dashboard.

   You can configure the Dashboard preferences to view the information you need to see often. You can configure your Dashboard to view specific panels in your Dashboard and arrange Dashboard panels in the order that you want.

2. Use the Dashboard.

   Depending on your Dashboard configuration, you can use the Dashboard to perform some or all of the following tasks:

   - See an overview of the number of tasks that are overdue, number of tasks you need to perform next, number of documents that you have saved as draft, and the number of new communications that you need to act upon.

   - See the list of alerts, and the number of alerts associated with each alert type, and number of alerts assigned to you.

   - See the list of tasks that you need to complete next and also by when you need to complete the task depending upon the choreography selected by your Sponsor.

   - See the list of tasks that are in overdue status and also the duration for which each task has been overdue.

   - See the list of POs that you have received from different Sponsors and the current status of each PO.

   - See the list of invitations that you have received from Sponsors to join their communities.

   - See the messages received from Sponsors.

   - See the list of new communications that you have received from Sponsors.

3. Accept the Sponsor's Invitation.

   You need to respond to the invitations to join your Sponsor's communities and adhere to the choreography and business rules defined by your Sponsor. If you

do not respond to the invitations within the duration mentioned by your Sponsors you cannot be a member of their community.

You can specify the agreement date from when you want to start the transactions. After accepting the terms and conditions set by your Sponsor, you become a Partner in your Sponsor's community and can start transacting with the Sponsor.

4. View Messages (Optional).

   You can view the messages received from your Sponsor. A message may contain business information that a Sponsor wants to share with members of a community.

5. Review, Process, Acknowledge, Ship, and Send Invoices for Orders.

   Your Sponsors send you orders or change orders. After you receive the documents, you have to mark the order as read. You can then perform the following tasks:

   - View the Details of an Order (Partner Task)
   - View the Payments for an Order (Partner Task)
   - Acknowledge an Order (Partner Task)
   - View the Acknowledgement of an Order (Partner Task)
   - Ship an Order (Partner Task)
   - Generate and Print a Packing Slip (Partner Task)
   - View the Details of a Shipment (Partner Task)
   - Complete a Draft Document (Partner Task)
   - Invoice an Order (Partner Task)
   - Invoice a Shipment (Partner Task)
   - View the Details of an Invoice (Partner Task)
   - View Charges and Allowances (Partner Task)
   - View Payment Terms for New Orders or Change Orders

     You can also use the Dashboard to review and process the orders.

6. Manage your Profile, Item Rules, and Items.

   Sterling Supplier Portal enables you to edit your profile information. You can view the agreement details.

   You can define your item rules for your organization in order to manage Sponsor items. You can choose to retain the same item identifier (ID) as defined by your Sponsor or can define different item ID.

   You can manage items and can also perform the following additional tasks, such as:

   - Add an Item to the Catalog (Partner Task)
   - Modify an Item in the Catalog (Partner Task)
   - Delete an Item from the Catalog (Partner Task)
   - Manage an Item in the Catalog (Partner Task)

     You can also send an updated inventory picture to your Sponsors, so that they will have up-to-date information about your available inventory.

7. View Reports.

   Sterling Supplier Portal enables you to view the Non-Compliance Summary report to analyze the chargeback documents that are received in a specified month.

Chapter 5. Dashboards

Configure Dashboard (Partner Task)

Before you start using the Dashboard, you may want to configure it to view information that you need most often.

About this task

You can configure the Dashboard to see any of the following panels:
- Overview: This panel provides an overview of new documents received from your Sponsors, tasks that you need to perform within a configured period of time, tasks that are overdue, and documents that you have saved as draft.
- Next Tasks: This panel lists the tasks that you need to perform within a configured period of time to fulfill your Sponsors' orders.
- Overdue Tasks: This panel lists the tasks which were not completed within the configured period of time.
- Order List: This panel lists orders received in the last <n> days, where you can configure the value of <n>.
- Message List: This panel lists the messages received from your Sponsors.
- Alert List: This panel lists alerts that can be used to monitor community-related tasks.

You can view a maximum of five panels in your Dashboard. You can also change the order in which these panels are displayed in the Dashboard.

To configure the Dashboard, perform the following steps.

Procedure

1. In the Home page, click **Configure Dashboard**.
2. From the Dashboard Panel drop-down list, select the panel or panels that you want to view, and click **Save**.

   The following table describes the fields that make up the individual Dashboard panels in the Configure Dashboard screen.

Field	Description
Dashboard Panel	From the drop-down list, select the dashboard panel you want to view on the Dashboard. You can select the following dashboard panels from the drop-down list: • Overview • Overdue Tasks • Next Tasks • Open Orders
Dashboard Panel Image	Displays the selected Dashboard Panel or Panels.

Configure the Dashboard to view the Overview Panel (Partner Task)

About this task

To configure the Overview Panel in the Dashboard, follow this procedure.

Procedure

1. In the Home page, click **Configure Dashboard**.
2. The various Dashboard panels that are available are displayed. Select **Overview** from the Dashboard panel drop-down list.

Configure the Dashboard to View the Overdue Tasks Panel (Partner Task)

About this task

To configure the **Overdue Tasks** panel in the Dashboard, follow this procedure.

Procedure

1. In the Home page, click **Configure Dashboard**.
2. From the Dashboard panel drop-down list, select **Overdue Tasks**.

Configure the Next Tasks Panel (Partner Task)

Sterling Supplier Portal enables you to configure the Next Tasks panel.

About this task

To configure the **Next Tasks** panel in the Dashboard, follow this procedure.

Procedure

1. In the Home page, click **Configure Dashboard**.
2. From the Dashboard panel drop-down list, select **Next Tasks**. The **Next Tasks** panel displays a list of tasks to be completed.
3. Click the **Configure** hyperlink in the **Configure Dashboard** panel.
4. The Configure Next Tasks screen is displayed. Click **Save**.

   The following table describes the fields that make up the Configure Next Tasks screen.

Field	Description
Number of Days to Look Ahead	Enter the number of days to look ahead for completing the tasks. The maximum number of days that can be specified to look ahead is 14.
Maximum Number of Records to Show	Enter the maximum number of records to be displayed. The maximum number of records that can be displayed is 500.

Configure the Open Orders Panel (Partner Task)

About this task

To configure the **Open Orders** panel in the Dashboard, follow this procedure.

Procedure

1. In the Home page, click **Configure Dashboard**.
2. From the Dashboard panel drop-down list, select **Order List**. In the **Open Orders** panel, a list of orders is displayed.

   The following table describes the fields that make up the **Open Orders** panel.

Field	Description
Order #	Indicates the order number. Click the corresponding **Order Number** hyperlink to view the Order Detail screen that displays the details pertaining to the selected order.
Customer	Indicates the customer. Click the corresponding **Customer** hyperlink to view the details of the customer.
Community	Indicates the community. Click the corresponding **Community** hyperlink to view the details of the community.
Order Date	Indicates the date on which the order was placed.
Order Total	Indicates the total cost of the order in dollars.
a Location	Indicates the location where the order has to be shipped.
Order Delivery Date	Indicates the date on which the order is delivered.
Order Status	Provides a series of indicators to show the current status of the purchase orders: Created - Indicates that the purchase order is created. Acknowledged - Indicates that the order has been fully acknowledged. For a partially acknowledged order, the indicator will be half filled. If the order is yet to be acknowledged, the indicator remains colorless. Shipped - Indicates that the order has been completely shipped. For partially a shipped order, the indicator will be half filled. If the order has not been shipped, the indicator remains colorless. Invoiced - Indicates that the invoice is complete. For a partially invoiced order, the indicator will be half filled. If the order has not been invoiced, the indicator remains colorless. Paid - Indicates that the payment for the order has been received and reviewed. For partial payment, the indicator will be half filled. If payment has not been made for the order, the indicator remains colorless.

3. Click the **Configure** hyperlink in the **Configure Dashboard** panel.
4. The Configure Open Orders screen is displayed. Click **Save**.

   The following table describes the fields that make up the Configure Open Orders screen.

Field	Description
Orders opened within the last days	Enter the number of orders that are in Opened status, and should be displayed in the **Open Orders** panel.
Maximum Number of Records to Show	Enter the maximum number of records to be displayed in the **Open Orders** panel.

Using the Dashboard (Partner Task)

Sterling Supplier Portal application provides a task based User Interface (UI) in the form of Dashboard panels. The task based UI enables you to view documents received from your Sponsors and tasks that you need to perform to fulfill the Sponsor's order.

The Dashboard is displayed as the Home page when you log in to Sterling Supplier Portal. You can also view the Dashboard from any other screen by clicking the **Home** hyperlink.

You can choose to see any of the following panels in your Dashboard:
* **Overview**: This panel provides an overview of new documents received from your Sponsors, tasks that you need to perform within a configured period of time, tasks that are overdue, new communications that you receive, and documents that you have saved as draft.
* **Next Tasks**: This panel lists the tasks that you need to perform within a configured period of time to fulfill your Sponsors' orders.
* **Overdue Tasks**: This panel lists the tasks that were not completed within the configured period of time.
* **Order List**: This panel lists orders received in the last <n> days, where you can configure the value of <n>.
* **Message List**: This panel lists the messages received from your Sponsors.
* **Alert List**: This panel lists alerts that can be used to monitor community-related tasks.
* **New Communications**: This panel lists the documents received from the Sponsors. If you are an EDI trading partner you can view only the chargeback documents.

You can view a maximum of five panels in your Dashboard. You can configure the panels that you need to see in your Dashboard. You can also change the order in which these panels are displayed in the Dashboard.

See an Overview of New Communications, Tasks, and Draft Documents

The **Overview** panel is visible in your Dashboard if you have configured the Dashboard to display this panel.

The **Overview** panel displays the following:
* Number of new communications (documents) received from your Sponsors.

  When you receive documents (Order, Change Order, Chargeback, Changed Chargeback, or Payment) from your Sponsors, these documents get listed as new communications in the **Overview** panel. Click the <**number**> hyperlink adjacent to **New Communications** to view the New Communications screen, which displays the list of New POs, Changed POs, Chargeback, Changed Chargeback,

and Payments that you have received from your Sponsors. For each document, the name of the Sponsor that sent the document, and the date and time on which the document was received, is displayed.

To process the new document, select the check box against the relevant document and click **View Details**. This will take you to the detail screen for the document, where you can perform the appropriate action on the document. If your Sponsor does not select the **Mark as Read** option when configuring a community, new communication alerts generated for new POs or Change POs are closed automatically when you navigate to the corresponding details screen.

The new communication alerts generated for the chargebacks or the changed chargebacks are closed automatically when you navigate to the corresponding Detail screen.

- Number of tasks that you need to perform next.

Based on the community configuration by your Sponsor, a document can be marked as read manually or automatically when it is received in your system. When a document is marked as read, a few tasks get generated for that document, depending upon the community's choreography. By default, the tasks that you need to perform today are listed as your next tasks. You can change the configuration to include tasks that you need to perform in the next <n> days. Based on the requested date and the business rules configured by your Sponsor for the community, these tasks remain in your Next Task bin for a specific number of days. Click the <**number**> hyperlink adjacent to **Next Tasks** to view the task list.

- Number of tasks that are overdue

Based on the requested date and the business rules configured by your Sponsor for the community, tasks need to be completed within a specified period of time. If you do not complete tasks within this time, these tasks get added to your list of overdue tasks. Click the <**number**> hyperlink adjacent to **Overdue Tasks** to view the overdue task list.

- Number of documents that you have saved as draft

When acknowledging or shipping an order, you can choose to save the Acknowledgement or Advance Shipment Notice (ASN) in Draft status and complete the draft later. The **Overview** panel lists the number of documents that you have saved as draft. To view the list of documents that you have saved as draft, click the <**number**> hyperlink adjacent to **Saved as Draft**.

  Note:
  – When a document is saved as draft, the related task is not considered to be complete. For example, if you are shipping an order and you save the Shipment as draft, the task will remain in your **Next Tasks** panel until you ship the order. If you do not ship the order within the completion due date, this task will move to the **Overdue Tasks** panel.
  – The **Overview** panel also enables you to access and process orders directly from the Dashboard if you know the order number. You can enter the order number in the **Order #** text box and click **Find** to view the order details. You can also enter the order number and click **Acknowledge**, **Ship**, or **Invoice** to acknowledge, ship, or invoice the order directly from the dashboard.

See Your Next Tasks

When an order is marked as read either manually or automatically, different tasks are generated for the order, depending on the community's choreography:

- If Acknowledge, Ship, and Invoice are present in the community's choreography, tasks get generated for acknowledging and shipping the order. When the order is shipped, a task gets generated for invoicing the shipment, with the task completion due date as the next day.
- If only Acknowledge and Invoice are present in the community's choreography, tasks for acknowledging and invoicing the order get generated as soon as the order is marked as read either manually or automatically.

  Note: If an order contains multiple order lines, tasks get generated only for the order line with the earliest ship date. If a task is completed for the entire order or a part of the order (for example, if a partial shipment is sent), this task is considered to be completed and is not listed as a next task.

The **Next Tasks** panel is visible in your Dashboard if you have configured the Dashboard to view this panel. You can configure the number of next tasks that you want to view in this panel. You can also configure the number of business days to look ahead. For example, if you configure this panel to look five business days ahead, it will display all the tasks that can be performed in the next five business days.

Note: Next Tasks are displayed in the Dashboard based on the business calendar configured for the Sponsor Organization. For example, if an order is received on a non-working day, task generation for the order begins on the next business day. If the date on which a task has to be completed falls on a day that is preceded by a non-working day, the system assumes that the task must be completed on the same day. Partners cannot view the business calendar.

You can use the **Next Tasks** panel to view the list of tasks that you need to perform, along with details on when the task is due to be completed. Click a <**task**> hyperlink to view details of that task and complete the task.

The **Next Tasks** panel lists five tasks at a time. If you have configured this panel to view more than five tasks, click the **More>>** hyperlink to view the next list of tasks.

The date when the task is due for completion is determined by the requested date and the business rules configured by your Sponsor for the community. If you specify a different date when acknowledging the order, or if the Sponsor sends a Change PO with a different requested date, the completion due date of the task will change. This task may not be listed in the **Next Tasks** panel if the due date falls beyond the look ahead date configured by you. If you cancel a shipment, the task of invoicing the shipment is deleted from the **Next Tasks** panel. However, if you resend a shipment, the earlier task of invoicing the shipment is replaced with a new task of invoicing the shipment with a new date in the **New Tasks** panel.

If an order that requires route planning is marked as read either manually or automatically, the **Send routing request for <Order number>** task instead of **Ship <Order number>** task is listed in the **Next Tasks** panel. When the shipment is sent for route planning, the **Ship <Shipment number>** task replaces the earlier task in the **Next Tasks** panel.

Note: The routing task and shipment task after sending routing requests will not display the order date or the shipping window in the new and overdue tasks.

See Your Overdue Tasks

If you do not complete certain tasks within the completion due dates, these tasks get added to your list of overdue tasks.

The **Overdue Tasks** panel is visible in your Dashboard if you have configured the Dashboard to view this panel. You can use the **Overdue Tasks** panel to view the list of tasks that are overdue, along with details on when the task was due to be completed. Click a <**task**> hyperlink to view details of that task and complete the task. Click [trash icon image] to delete the task without completing it.

Note: Overdue tasks will continue to get listed in the **Overdue Tasks** panel until you either complete or delete the task.

The **Overdue Tasks** panel lists five tasks at a time. If you configure this panel to view more than five tasks, you can click the **More>>** hyperlink to view the next list of tasks.

The date when the task was due for completion is determined by the requested date and the business rules configured by your Sponsor for the community. If you specify a later date when acknowledging the order, or if the Sponsor sends a Change PO with a later requested date, the completion due date of the task will change. This task may be removed from the **Overdue Tasks** panel and listed in the **Next Tasks** panel.

Note: Overdue Tasks are displayed in the Dashboard based on the business calendar configured for the Sponsor Organization. For example, if a task was due to be completed on Monday and as per the business calendar configured, Tuesday is a non-working day, the corresponding task will be moved to Overdue Tasks on Wednesday.

If you do not receive a route plan for a shipment from your Sponsor by the end of that day, the **Routing response for <Shipment number> due** task is generated the next day in the **Overdue Tasks** panel. Contact your Sponsor to ask about the delay in receiving the corresponding route plan so you can send the shipment to the Sponsor.

Delayed Payment Advice notifications are directly displayed in the **Overdue Tasks** panel when the Payment Advice are not received within the payment advice due date. The payment advice due date is either specified in the business rules configured by your Sponsor for the community or provided by you when invoicing the order. However, this notification is displayed only if your Sponsor has configured the corresponding business rule to send Payment Advice for the community.

Note: The routing task and shipment task after sending routing requests will not display the order date or the shipping window in the new and overdue tasks.

See the Summary of Open Orders

The **Open Orders** panel is visible in your Dashboard if you have configured the Dashboard to view this panel. You can configure this panel to specify the number of POs that you want to list in the panel. You can also specify that you want to see all orders which have been received in the last <n> days.

The **Open Orders** panel provides a comprehensive view of POs that you have received from different Sponsors. The panel provides information about the order

number, order date, Sponsor, community, expected delivery date, order amount, and the address where the shipment is to be sent. It also displays the current status of each PO. Click the **Order Number** hyperlink to view the order details for processing. Click the **Customer** and **Community** hyperlink to view the Sponsor and community details.

See the List of Invitations Received from Sponsors

The **Invitation List** panel is visible in your Dashboard if you have configured the Dashboard to view this panel. You can use the **Invitation List** panel to view the list of the invitations received from Sponsors to join their communities.

See the List of Messages Received from Sponsors

The **Message List** panel is visible in your Dashboard if you have configured the Dashboard to view this panel. You can use the **Message List** panel to view a list of messages received from your Sponsors. These messages are broadcast messages sent to all Partners belonging to a community.

See the List of Alerts

The **Alert Summary** panel is visible in your Dashboard if you have configured the Dashboard to view this panel.

You can use the **Alert Summary** panel to view a comprehensive, high-level list of alerts to monitor community-related tasks. This panel displays different Alert Types, along with the total number of raised alerts associated with each type. The **My Alerts** column displays the number of alerts associated with your profile. Click the <**number**> hyperlink to view the details of an alert. Click the **Total Alerts** hyperlink to view all the alerts raised for that alert type.

Note: Alerts are displayed in the Dashboard based on the business calendar configured for the organization.

See the New Communications

The **New Communications** panel is visible in your Dashboard if you have configured the Dashboard to view this panel. You can use this panel to view the new communications received from your Sponsors.

If you are an EDI trading partner you can view only the chargeback documents in the **New Communications** panel. The **New Communications** panel and the **Messages List** panel is displayed by default in your Dashboard.

Chapter 6. Review and Process New and Change Orders (Partner Task)

Sterling Supplier Portal enables you to review and process the new orders and change orders sent by Sponsors. New Customer Purchase Orders (POs) and change Customer POs sent by Sponsors are displayed in the **New Communications** panel of the Dashboard as New PO alert and Change PO alert respectively.

Depending on the community configuration, a new PO or change PO can be confirmed as being read either manually or automatically. If the **Mark As Read** option is enabled, it indicates that your Sponsor has configured a community such that you need to manually mark documents as read. If this option is not displayed, it indicates that your Sponsor has configured a community such that the order or change order is confirmed as read automatically when you navigate to the corresponding details screen from the New Communications screen. Therefore, depending on the community configuration you may have to perform the following tasks:

- Review and Process a New Purchase Order When Mark As Read Option is Enabled
- Review and Process a New Purchase Order When Mark As Read Option is Disabled
- Review and Process a Changed Order When Mark As Read Option is Enabled
- Review and Process a Change Order When Mark As Read Option is Disabled

Review and Process a New Purchase Order When Mark As Read Option is Enabled

When your Sponsor sets up a community, the Sponsor can select the **Mark As Read** option. As the partner, you have to manually mark new purchase orders as being read.

Procedure

If your community has the **Mark As Read** option enabled, follow these steps to review and process a new PO:

1. On the Home page, click **New Communications** in the **Overview** panel.
2. The New Communications screen is displayed. .

   The following table describes the settings on the New Communications screen.

Action	Description
Delete	You can remove a new communication. Select the check box for that new communication and click **Delete**. When you click **Delete**, a warning message is displayed: "Do you really want to delete this communication?" Click **OK** to remove that record from the New Communications screen.
View Details	Click **View Details** to open the Order Detail screen.
Field	Description

Action	Description
Subject	Shows the subject of the new communication.
	You can click the **Subject** hyperlink of the purchase order to open the Order Detail page.
From	Shows the name of the customer.
Received	Shows the date the communication was received.

3. Select the check box for the **New PO** alert and click **View Details**. You can also click the **Subject** hyperlink of the corresponding PO. The Order Detail screen is displayed.

4. Click **Mark As Read** to confirm the order and do additional processing.

5. You might have configured an item rule such that your Item ID is different from your customer's Item ID. As a result, you might receive an order from your Sponsor containing Item IDs that cannot be linked to your Item IDs. You can use the following process to specify the matching Item ID:

   a. In the **Item Line(s)** panel of the Order Detail screen, enter the identifier of the item.

   b. You can also click the ⌕ icon to search for the Item ID. Enter the appropriate search criteria and click **Search** to view the list of items that match the search criteria.

   c. Click **Mark As Read**.

   d. Click the ✔ icon for the appropriate item. The selected Item ID is displayed.

   Note: If your Sponsor has sent a change order for this order, the change order is not marked as read automatically, even if your Item ID and the customer's Item ID match. You must manually mark the change order as read by navigating to the corresponding detail screen from the New Communications screen.

Review and Process a New Purchase Order When Mark As Read Option is Disabled

When your Sponsor set ups a community, the Sponsor can disable the **Mark As Read** option. The purchase order is automatically confirmed as read when you navigate to the corresponding details screen from the New Communications screen.

Procedure

If your community has the **Mark As Read** option disabled, follow these steps to review and process a new PO:

1. On the Home page, click **New Communications** in the **Overview** panel.

2. The New Communications screen is displayed.

   The following table describes the settings on the New Communications screen.

Action	Description
Delete	You can remove a new communication. Select the check box for that new communication and click **Delete**. When you click **Delete**, a warning message is displayed: "Do you really want to delete this communication?" Click **OK** to remove that record from the New Communications screen.
View Details	Click **View Details** to open the Order Detail screen.
Field	**Description**
Subject	Shows the subject of the new communication. You can click the **Subject** hyperlink of the purchase order to open the Order Detail page.
From	Shows the name of the customer.
Received	Shows the date the communication was received.

3. Select the check box for the **New PO** alert and click **View Details**. You can also click the **Subject** hyperlink of the corresponding PO. The Order Detail screen is displayed.

   When this PO is received in your system, it is set to the **Created** status and all the tasks are generated.

4. You might have configured an item rule such that your Item ID is different from your customer's Item ID. As a result, you might receive an order from your Sponsor containing Item IDs that cannot be linked to your Item IDs. The order is not marked as read automatically unless the customer Item ID is mapped to your Item ID:

   a. In the **Item Line(s)** panel of the Order Detail screen, enter the identifier of the item.

   b. You can also click the 🔍 icon to search for the Item ID. Enter the appropriate search criteria and click **Search** to view the list of items that match the search criteria.

   c. Click the ✅ icon for the appropriate item. The selected Item ID is displayed.

   d. Click **Save Changes** to mark the order as read and process it further.

   e. When you click **Save Changes**, the PO is set to the **Created** status. However, the other tasks generated for this PO on the New Communications screen are not resolved. You must open these tasks from the New Communications screen to resolve them.

   Notes:
   - If your Sponsor has sent a change order, the change order is not marked as read automatically, even if your Item ID matches the customer's Item ID. You must manually mark the change order as read by navigating to the corresponding detail screen from the New Communications screen.
   - If you delete a record from the new communication list accidentally, you can always view the deleted records by using the enhanced **Search Criteria - Find Order** panel in the Find Order screen. You can select a date range in the **Received Date** field to search for a PO that was marked as read automatically. If your Item ID is different from your customer's Item ID, you can select **Unread Orders** to display the list of POs that are not confirmed because mapping does not exist for the order lines.

Review and Process a Changed Order When Mark As Read Option is Enabled

When your Sponsor sets up a community, the Sponsor can select the **Mark As Read** option. As the partner, you have to manually mark change orders as being read.

About this task

A Sponsor cannot send a change request to a Partner under the following circumstances:

- The Sponsor cannot send a Change PO request when all of the documents pertaining to the choreography have been sent by the Partner.
- The Sponsor cannot cancel or reschedule the shipment of the order lines to an earlier date, which have already been shipped.

Note: If a change order is rejected, a Partner cannot view an error message. Only your Sponsor can view the corresponding error when viewing the error summary report.

Procedure

If your community has the **Mark As Read** option enabled, follow these steps to review and process a new PO:

1. In the Home page, click **New Communications** in the **Overview** panel.
2. The New Communications screen is displayed. Select the check box against the Changed PO alert and click **View Details**. Alternatively, you can click the Subject hyperlink of the corresponding alert.
3. The Change Order Detail screen is displayed. Click **Mark As Read** to confirm the order and process it further.

   Note: If you delete a record from the new communication list accidentally, you can always view the deleted records by using the enhanced **Search Criteria - Find Order** panel in the Find Order screen. You can select the **Unread Change Orders** radio button to display the list of change POs that are not marked as read.

   To view the changes made to the order:

   a. In the Home page, click **New Communications** in the **Overview** panel.
   b. The New Communications screen is displayed. Select the check box against the **Changed PO** alert hyperlink and click **View Details**. Alternatively, you can click the **Subject** hyperlink of the corresponding alert.
   c. The Change Order Detail screen is displayed. Click **View Changes**.

   The Change Log dialog box is displayed containing information about the changes, including the field names or attributes, and the values.

   Note:
   - If notes have been added, a message is displayed indicating that the notes have been added. You need to navigate to the Order Detail screen to view the added notes.
   - Modifications, if any, in the Sponsor notes will not be displayed.
   - If the Sponsor includes the notes from PO in the corresponding change order, duplicate entries for these notes may be created.

The following table describes the fields that make up the Change Log dialog box in the Change Order Detail screen.

Field	Description
Attribute	Indicates the name of the field in which the value has been changed.
New Value	Indicates the changed value.
Old Value	Indicates the earlier value.

Note: The Item ID and description are displayed below each order line. The changed order line displays all the changed attributes pertaining to that order line. The Item ID is always displayed below the changed order line header details.

To view the complete order details:

a. In the Home page, click **New Communications** in the **Overview** panel.

b. The New Communications screen is displayed. Select the check box against the **Changed PO** alert hyperlink and click **View Details**. Alternatively, you can click the **Subject** hyperlink of the corresponding alert.

c. The Change Order Detail screen is displayed. Click **View Complete Order**.

The Order Detail screen containing the complete details is displayed.

Review and Process a Change Order When Mark As Read Option is Disabled

About this task

A Sponsor cannot send a change request to a Partner under the following circumstances:

- The Sponsor cannot send a Change PO request when all of the documents pertaining to the choreography have been sent by the Partner.
- The Sponsor cannot cancel or reschedule the shipment of the order lines to an earlier date, which have already been shipped.

Note:

- If a change order is rejected, a Partner cannot view an error message. Only your Sponsor can view the corresponding error when viewing the error summary report.
- If multiple change orders have been received for the order, you must either open these change orders from the New Communications screen or view the Order Detail screen corresponding to the PO to resolve the corresponding new communication alerts.

If you belong to a community for which your Sponsor has disabled the **Mark As Read** option when configuring the community, you need to perform the following steps in order to review and process a change PO.

Procedure

1. In the Home page, click **New Communications** in the **Overview** panel.

2. The New Communications screen is displayed. Select the check box against the Changed PO alert and click **View Details**. Alternatively, you can click the **Subject** hyperlink of the corresponding alert.

The Change Order Detail screen is displayed containing only the changes made to the order.

Note:

- If you delete a record from the new communication list accidentally, you can always view the deleted records by using the enhanced **Search Criteria - Find Order** panel in the Find Order screen. You can select a date range in the **Received Date** field to search for a change PO that was marked as read automatically. If your Item ID is different form your customer's Item ID, you can select the **Unread Change Orders** radio button to display the list of change POs that are not confirmed due to reasons such as the items are not mapped or the original PO is not yet confirmed.
- When the following sequence of events occurs, the **Save Changes** button is displayed and you must click this button to mark the change order as read:

  You have configured an item rule such that your Item ID is different from your customer's Item ID.

  You receive a change order from your Sponsor containing Item IDs that cannot be linked to your Item IDs.
- When the following sequence of events occurs, the **Mark as Read** button is displayed and you must save the changes in the original order and then click the **Mark as Read** button to apply the changes on the original order:

  You have configured an item rule such that your Item ID is different from your customer's Item ID.

  The original order is in the Draft status.

  You receive a change order from your Sponsor containing Item IDs that are linked to your Item IDs.

To view the changes made to the order:

a. In the Home page, click **New Communications** in the **Overview** panel.

b. The New Communications screen is displayed. Select the check box against the **Changed PO** alert hyperlink and click **View Details**. Alternatively, you can click the **Subject** hyperlink of the corresponding alert.

c. The Change Order Detail screen is displayed. Click **View Changes**.

   The Change Log dialog box is displayed containing information about the changes, including the field names or attributes, and the values.

   Note:

   - If notes have been changed, a message is displayed indicating that the notes have been updated. You need to navigate to the Order Detail screen to view the updated notes.
   - Modifications, if any, in the Sponsor notes will not be displayed.
   - If the Sponsor includes the notes from PO in the corresponding change order, duplicate entries for these notes may be created.

     The following table describes the fields that make up the Change Log dialog box in the Change Order Detail screen.

Field	Description
Attribute	Indicates the name of the field in which the value has been changed.
New Value	Indicates the changed value.
Old Value	Indicates the earlier value.

Note: The Item ID and description are displayed below each order line. The changed order line displays all the changed attributes pertaining to that order line. The Item ID is always displayed below the changed order line header details.

To view the complete order details:

a. In the Home page, click **New Communications** in the **Overview** panel.

b. The New Communications screen is displayed. Select the check box against the **Changed PO** alert hyperlink and click **View Details**. Alternatively, you can click the **Subject** hyperlink of the corresponding alert.

c. The Change Order Detail screen is displayed. Click **View Complete Order Details**.

   The Order Detail screen containing the complete details is displayed.

Chapter 7. Review a Payment

You can use Sterling Supplier Portal to review your payments from the sponsor.

About this task

If your Sponsor has configured the community so that you are not required to manually mark a PO or Change PO as Read, the payment is reviewed automatically. In such a scenario, the **Reviewed** button on the Payments page is not displayed.

However, if multiple payments are received for an order, you must open each payment from the New Communications page to resolve the corresponding tasks.

Procedure

To review a payment, follow these steps:

1. On the Home page, click **New Communications** in the Overview Panel of the Dashboard. The New Communications page is displayed.
2. Select a new payment and click **View Details**. Alternatively, you can click the corresponding new payment hyperlink. The Payments page is displayed.
3. Click **Reviewed** to mark the payment as reviewed.

   The following table describes the fields that make up the New Communications page.

Action	Description
View Details	Click this to view the details of the new payment. Alternatively, you can click the **Subject** hyperlink of the corresponding new payment.
Field	**Description**
Subject	Shows the subject of the communication received. Click the **Subject** hyperlink of the corresponding new payment to view the details.
From	Shows the name of the customer.
Received	Shows the date on which the communication is received.

The following table describes the fields that make up the Order Header panel of the Order Detail page.

Field	Description
Order #	Shows the number of the purchase order.
Req. Ship Date	Shows the shipment date requested by the Sponsor.
Status	Shows the status of the order. The identifier of the status is also displayed in the panel.
Order Date	Shows the date on which the order was placed.
Req. Delv. Date	Shows the delivery date requested by the Sponsor.
Terms	Shows the terms of the order.

Field	Description
Customer	Shows the name of the customer. Click the corresponding **Customer** hyperlink to view information about the customer.
Community	Shows the name of the community. Click the corresponding **Community** hyperlink to view information about the community.
Order Amount	Shows the total order amount.

The following table describes the fields that make up the Payment Details panel.

Field	Description
Currency	Shows the currency type of the order.
Payment Date	Shows the date on which the payment was made by the Sponsor.
Amount	Shows the total order amount in the currency specified in the order.
Type	Shows the mode of payment.
Payment Reference #	Shows the reference number that was assigned to the payment: • If the payment method used by the Sponsor is Check, the Check Number is displayed. • If the payment method used by the Sponsor is Credit Card, the Credit Card Number is displayed. • If the payment method used by the Sponsor is SWIFT, the Bank Identifier Code (BIC) is displayed. • If the payment method used by the Sponsor is CHIPS, the 3-digit or 4-digit international interbank transaction number is displayed.
Invoice #	Shows the invoice number. Click the **Invoice Number** hyperlink to view information about the invoice.

Chapter 8. Complete a Draft Document (Partner Task)

About this task

Sterling Supplier Portal enables you to save the Acknowledgement and Advance Shipment Notifications (ASNs) of an order in draft form, and complete them at a later stage.

To complete a draft document, follow these steps.

Procedure

1. In the Home screen, click **Saved as Draft** in the **Overview** panel.
2. The Drafts screen is displayed. In the **Drafts** panel, click the link pertaining to the document you want to complete.
3. To complete the Acknowledgement that is in draft form, enter the appropriate values in the fields, and perform one of the following tasks:
   - Click **Save Draft** to save the changes made to the draft document.
   - Click **Send Acknowledgement** to send the acknowledgement to the Sponsor.
   - Click **Reject** to reject an order.
   - Click **Delete** to delete the acknowledgement.
4. To complete the ASN of an order that is in draft form, enter the appropriate values in the fields, and perform one of the following tasks:
   - Click **Save Draft** to save the changes made to the draft document.
   - Click **Send ASN** to send the ASN to the Sponsor.
   - Click **Delete** to delete the ASN.

Chapter 9. Respond to Invitations (Partner Task)

To join a community, you have to respond to the invitation that your Sponsor sends you.

Procedure

To respond to an invitation to join a Sterling Supplier Portal community, follow these steps:

1. Navigate to the Respond to Invitation page. You have the following options:

   Menu Bar

   > Click **Inbox** > **View Invitations**. The My Invitations page is displayed.

   > Click the **Subject** link to open the Respond to Invitation page.

   Home Page

   > In the Alert Summary panel, click the **Total Alerts** hyperlink. The Alert Detail page is displayed.

   > In the **Detail** field, click the **Invitation** hyperlink to open the Respond to Invitation page.

2. Review the following panels on the Respond to Invitation page:

   Contact for Step

   > Displays the details of the Sponsor's contact for the step. The fields in this panel are read-only and cannot be edited.

   > The fields in the Contact for Step panel are only populated if your Sponsor assigned a contact to the step when the Sponsor executed the program.

   Choreography

   > Displays the type of choreography that your Sponsor selected for the Supplier community. The choreography can be one of the following entries:
   > - ANSI X12 EDI
   > - EDIFACT
   > - Sterling XML

3. Sponsors can provide their own custom terms and conditions document for the community. If your sponsor has provided a terms and conditions document, the Review Community Configuration step displays the following notice:

   ```
   Attention! Download Terms and Conditions document. Click Next if you
   agree with its contents.
   ```

   After you review the document, click **Next** to accept the terms and conditions and move to the next step of the invitation process.

   Note: You will only see this step in the invitation process if your Sponsor has uploaded a custom terms and conditions document.

4. When the Business Rules panel opens for the selected choreography, you can view the business rules the Sponsor defined.

For example:

- The Sponsor can specify how many days the partner has to submit each Purchase Order acknowledgement. If you do not send the acknowledgment within the specified number of days after receiving the purchase order, the acknowledgement is marked as overdue.
- For the Advance Ship Notice (ASN), the Sponsor can specify how many days after the requested shipping date that you are required to ship the product. If you do not ship the product within the specified number of days, the shipment is marked as overdue

5. Click **Next** to open the Payment Method panel. Sponsors can pay suppliers using Cash, Credit Card, Check, CHIPS, or SWIFT transactions.

6. When you are done viewing the payment methods, click **Step Completed**. The Contact for Step and Accept Community Configurations panels are displayed.

7. In the Contact for Step panel, click **Select Contact** to assign a contact to the step. You can either create and assign a new contact to the step or assign an existing contact to the step.

8. In the Accept Community Configurations panel, set **I agree to the terms and conditions of the community** to **Yes**.

9. When you are done viewing the terms and conditions, click **Step Completed**.

10. After you complete all the steps of the program, the Capture Agreement Start Date panel is displayed. You can enter the date you want to join the community. Select a date and click **Finalize** to join the community.

Chapter 10. Select a Contact for Step When Responding to an Invitation (Partner Task)

You can create and associate a new contact or associate an existing contact to the step. A contact is the person that is associated to a Partner and can be contacted for information about the step.

Procedure

To select a contact for the step, follow these steps:

1. Navigate to the Respond to Invitation screen in either of the following ways:
   - From the Home page

     In the **Alert Summary** panel, click the **Total Alerts** hyperlink.

     The Alert Detail screen is displayed. In the **Detail** field, click the **Invitation** hyperlink to respond to the Sponsor's invitation.
   - From the menu bar

     Navigate to **Inbox** > **View Invitations**.

     The My Invitations screen is displayed. Click the **Subject** link to respond to the Sponsor's invitation.
2. The Respond to Invitation screen containing the **Contact for Step** panel is displayed. The **Contact for Step** panel displays the details of the Sponsor's contact pertaining to the step that enables you to respond to the invitation. The fields in this panel are read-only and cannot be edited.

   Note: The fields in the **Contact for Step** panel are populated only if your Sponsor has associated a contact to the step when executing a program.
3. In the Respond to Invitation screen, click **Next**.
4. The **Business Rules** panel for selected choreography is displayed. Click **Next**.
5. The **Payment Method** panel is displayed. The various payment methods that a sponsor can use to pay the suppliers are Cash, Credit Card, Check, CHIPS, and SWIFT. Click **Step Completed**. The **Contact for Step** and **Accept Community Configurations** panels are displayed.
6. In the **Contact for Step** panel, click **Select Contact** to associate a contact to the step.
7. In the dialog box that is displayed, perform either of the following tasks:
   - Create and associate a new contact to the step.
   - Associate an existing contact to the step.
8. To save the contact details and associate the contact to the step, click **Save**.

Create and Associate a New Contact to the Step

Procedure

1. In the dialog box, select the **Create New Contact** radio button.
2. The **Create Contact** panel is displayed. Enter the appropriate values in the fields.

   The following table describes the fields in the **Create Contact** panel of the dialog box.

Field	Description
First Name	Enter the first name of the contact.
Last Name	Enter the last name of the contact.
Email*	Enter the e-mail address of the contact.
Address Line1	Enter the first line of the address.
Address Line2	Enter the second line of the address, if applicable.
Address Line3	Enter the third line of the address, if applicable.
City	Enter the city in which the contact is located.
State	Enter the state in which the contact is located.
Zip	Enter the zip code of the city in which the contact is located.
Country	From the drop-down list, select the country in which the contact is located.
Daytime Phone #	Enter the phone number of the contact when at work.
Mobile Phone #	Enter the mobile phone number of the contact.
Fax #	Enter the fax number of the contact.
Job Title	Enter the designation of the contact.

Note: * = Mandatory field

Associate an Existing Contact to the Step

Procedure

1. In the dialog box, select the **Use Existing Contact** radio button.
2. The **Contact List** panel is displayed. Click ✐ adjacent the contact that you want to associate to the answer block.

   The contacts in the **Contact List** panel are the contacts that your Sponsor has created for you when managing contacts.

   The following table describes the fields in the **Contact List** panel of the dialog box.

Field	Description
Contact Name	Indicates the name of the contact.
Job Title	Indicates the designation of the contact.
Email	Indicates the e-mail address of the contact.

Chapter 11. View a Message (Partner Task)

Sterling Supplier Portal enables you to view the messages received from your Sponsor. A message may contain business information that a Sponsor wants to share with you, if you are a member of their community.

Chapter 12. Manage the Packing Profile (Partner Task)

About this task

You can enter your company's Global Standard 1 (GS1) prefix that is used when printing container labels.

To manage the packing profile of a Partner, follow these steps.

Procedure

1. From the menu bar, navigate to **Setup** > **Manage Packing Profile**.
2. The Manage Packing Profile screen is displayed. In the **Enter your company's GS1 prefix** field, enter your company's GS1 prefix. The system supports between seven to nine digits in this field.
3. Click **Save**.

Chapter 13. View the Details of a Shipping Window Order (Partner Task)

About this task

You can use Sterling Supplier Portal to search for and view the details of shipping window orders. A shipping window order is an order where the sponsor/buyer specifies the date range at the order level (and not at line level) so that the entire order is shipped between the desired date range. The shipping window label is displayed in the order, acknowledgement, and shipment detail screens for a shipping window order.

Notes:

- The shipping window order should be specified at the order header level. The same details are carried over to the line level.
- When a shipping window order is acknowledged, the shipping window is broken down and the validations are done based on the acknowledged date.

Chapter 14. View the Details of an Order (Partner Task)

You can search for orders and view the details of these orders.

About this task

If you are an EDI-capable Partner and are registered in a Chargeback Only community, you can only view the order details. You cannot perform any of the related order tasks.

This topic describes the default layout of the Find Order page:
- The Sponsor might have created the layout to hide or disable some of the fields.
- The Sponsor can choose which fields are required.
- The order of the fields might vary, if the Sponsor has selected a different user interface layout.

Procedure

To search for confirmed orders, follow these steps:
1. From the menu bar, click **My Documents** > **Orders**.
2. The Search Criteria - Find Order panel is displayed on the Find Order page. Enter the search criteria and click **Search**.

   The following table describes the actions and fields in the Search Criteria - Find Order panel on the Find Order page.

Action	Description
Favorite Searches	Click this to search for a saved search and execute it. This option is available only if a set of search criteria has been saved as a favorite search.
Save Search	Click this to save the current search criteria as a favorite search. On clicking this, the **Save Search** dialog box is displayed. Enter the name that you want to associate to the search criteria. Select the **Auto Execute** check box to automatically execute the search each time you navigate to the Order Search page.
Delete Current Search	Click this to delete the current search criteria that has been saved as a favorite. This action is enabled when you are viewing a saved search.
Field	**Description**
Order #	Enter the **Order #** you want to search for. You can also select one of the following options: • **is**: The application searches for the exact order number. • **starts with**: The application searches for order numbers that start with the specified value.
Community	Enter the name of the community created by the Sponsor to whom the purchase order belongs. Alternatively, click 🔍 to search for a community.
Order Date	Enter the date range between which the purchase order was created, and which is to be included in the search. Alternatively, click ▦ to select the date range.

Action	Description
Item ID	Enter the identifier of the item to be included in the search.
Item Description	Enter the description of the item to be included in the search.
Status	From the drop-down list, select the status of the order to be included in the search.
Received Date	Enter the date range within which orders were created. You can also click ⊞ to select the appropriate date.
<Order Delivery Date **or** Order Ship Date> Is on <date> or Within <number> Days After.	From the first drop-down list, select either the **Order Delivery Date** or **Order Ship Date** option and enter the corresponding date in the text box. You can also click ⊞ to select the appropriate date.
	From the second drop-down list, which is enabled only after entering the date in the **Is On date** field, select the number of days. Also, the date selected from this second drop-down list decides the range of the **Order Delivery Date** and **Order Ship Date**.
	The search includes all the shipments that are expected to be delivered (or shipped) between the date that is entered and the day after the selected number of days.
	In case the shipment contains only shipping window orders then the literal will be shown as **shipping window**.
	If the shipment contains even one order which is not a shipping window orders then the literal will be shown as **order ship date**.
Include Archived Orders	Select this check box to include the archived orders in the search.
	Archived orders are orders that have not been processed for 3 months.
User-Defined Fields	Enter the user-defined fields (UDF) you want to search for. You can also select one of the following options:
	• **is**: The application searches for the exact user-defined field value.
	• **starts with**: The application searches for the user-defined fields that start with the specified value.
	If the Partner belongs to more than one community, you must select a value in the **Community** field to view the user-defined fields on the Search Criteria page.
Read Orders	Select this option to display the list of POs that you have Marked as Read.
Unread Orders	Select this option to display the list of POs that are not marked as read.
	If your Sponsor has configured the community so that the orders are automatically marked as read, selecting **Unread Orders** might not provide any search results. However, if your Item ID is different from your customer's Item ID, you can select **Unread Orders** to display the list of POs that are not marked as read.

Action	Description
Unread Change Orders	Select this option to display the list of Changed POs that are not marked as read. If your Sponsor has configured the community so that the change orders are automatically marked as read, selecting **Unread Change Orders** might not provide any search results. However, if your Item ID is different from your customer's Item ID, you can select **Unread Change Orders** to display the list of change POs that are not marked as read.
Sort Result by	Select the attribute by which the search result should be sorted when displayed in the Search List panel. If you select a value here, the search result in the Search List panel will be sorted in ascending order. To sort the result in descending order, select the **Sort in Descending Order** check box. If you do not select a value here, the search result in the Search List panel will not be sorted.
Sort in Descending Order	Select this check box to sort the search result in the Search List panel in descending order.
Max Records	Shows the maximum number of orders that will be displayed in the Search List panel. You can enter the maximum number of orders to be displayed as Search results.

> **Note:** If you select the **Unread Orders** or **Unread Change Orders** option, the Search List panel displays only unread orders or unread change orders.

3. The Search List panel is displayed with the list of orders. From this list, select the check box against the orders whose details you want to view and click **View Details**. Alternatively, you can click the **Order Number** hyperlink. The Order Detail page is displayed.

The following table describes the fields and the action that make up the Search List panel on the Find Order page.

Action	Description
View Details	Click this to view the Order Detail page.
Print	Click this to print a PDF version of the order. You can only select one order to print at a time. **Note:** Make sure the **Read Orders** option is selected in the search criteria, otherwise the **Print** button is not available.
Field	**Description**
Order #	Shows the order number. Click the corresponding **Order Number** hyperlink to view the Order Detail page, which displays the details pertaining to the Order Number selected.
Customer	Shows the details of the customer. Click the corresponding **Customer** hyperlink to view the details of the customer.
Community	Shows the community that is created by the Sponsor to whom the Purchase Order belongs.
Order Date	Shows the date on which the order was placed.
Order Total	Shows the total cost of the order in the currency specified in the order.
Order Delivery Date	Shows the date on which the order is expected to be delivered.

Action	Description
Order Ship Date / Shipping Window	Shows the date on which the order is expected to ship.

If the shipment contains only shipping window orders, the field is displayed as **Shipping Window**.

If the shipment contains at least one order that is not a shipping window order, the field is displayed as **Order Ship Date**. |
| Status | Provides a series of indicators to show the current status of the purchase orders. When viewing the indicators, consider the following:

Partial indicators represent a partially complete document, where each order line quantity in that status is greater than zero and less than the ordered quantity. However, in the case of Paid status, partial indicator represents a partially complete document where the paid amount for an order is greater than zero and less than the ordered amount.

Complete indicators represent a completed document.

is displayed as a status if the task is not included in the choreography for an order.

The following are the indicators that show the current status of the purchase orders:

Created - Shows that the purchase order is created.

Acknowledged - Shows that the order has been fully acknowledged. For a partially acknowledged order, the indicator will be half filled. If the order is yet to be acknowledged, the indicator remains colorless.

Shipped - Shows that the order has been completely shipped. For a partially shipped order, the indicator will be half filled. If the order has not been shipped, the indicator remains colorless.

Invoiced - Shows that the invoice is complete. For a partially invoiced order, the indicator will be half filled. If the order has not been invoiced, the indicator remains colorless.

Paid - Shows that the payment for the order has been received and reviewed. For partial payment, the indicator will be half filled. If the payment for the order has not been made, the indicator remains colorless.
Note: If you select the **Unread Orders** or **Unread Change Orders** option to be included in the search criteria, then in the Search List panel the status indicators will be colorless. |
| | Click to view the user-defined fields for an order.

The user-defined fields are only shown if your Sponsor configured them to be displayed on the List page. |

The following table describes the fields and the action that make up the Primary Information panel on the Order Detail page. If you are viewing the details pertaining to a change PO, the Change Order Detail page is displayed.

Action	Description
Mark as Read	Click this to process the order. After confirming the order, tasks such as Acknowledge the Order and Ship the Order are displayed in the **Overview**, **Next Tasks**, and Overdue Tasks panels of the Dashboard. **Note:** • This action is displayed only if your Sponsor has configured a community such that you must manually mark documents as read in order to process the documents further. • This action is displayed only for new or change POs. • If a user inadvertently clicks **Mark as Read** twice, an error is thrown and the order will not be processed. It is therefore recommended that the user clicks this only once.
Print	Click this to view a PDF version of the order. **Note:** This option is available only after the order is marked as **Read**. (It is not available if the status of the order is **Draft**.)
Related Tasks	Click this to perform the additional tasks related to the order. You can perform the following tasks: Ack. PO - Click this to acknowledge an order. Ship PO - Click this to send an ASN of an order to the Sponsor. Invoice PO - Click this to invoice an order. View Acknowledgement - Click this to view the acknowledgement for an order. View Shipments - Click this to view the shipments associated with the order. View Invoices - Click this to view the invoices associated with the order. View Payments - Click this to view the payment details associated with the order. View New Communications - This related task is displayed only if you have navigated to this page from the New Communications page. Click this to navigate to the New Communications page. View Complete Order Details - This related task is displayed on the Change Order Detail page. Click this to navigate to the Order Detail page. **Note:** These tasks are available depending on the choreography of the community to which you belong.
Notes	Click this action to view the Sterling as a Service Applications pop-up window, which displays the notes added at the header-level of the order. Notes added by Sponsor at the order header-level are indicated by the ⬛ icon, and notes added by Partner at the order header-level are indicated by the ⬛ icon. Enter your note in the Add Note panel and click **Add** to save the contents of the note.
View Payment Terms	Click this to view the Payment Terms page that displays the payment terms for the order.

Action	Description
Field	**Description**
Order #	Shows the order number.
	Click the icon to view the Sterling as a Service Applications pop-up window, which displays the notes added at the header-level of the order. Notes added by Sponsor at the order header-level are indicated by the icon, and notes added by Partner at the order header-level are indicated by the icon.
	Enter your note in the Add Note panel and click **Add** to save the contents of the note.
Order Date	Shows the date on which the order was placed.
Customer's PO #	Shows the customer's Purchase Order number.
Order Ship Date (Requested)	Shows the requested date range for the shipment. **Notes:**
	• For an order or a change PO, the shipping date range that is defined at the header level is applied to all the order lines.
	• If schedules are passed at line level, the shipping dates in the schedules will be consolidated and validated against the shipping date range defined at the header level.
	If the shipping date range in the schedule is larger than the shipping date range at the order header-level, the order will not be accepted.
	• If a change order contains a change in the shipping dates, either in the shipping date or the shipping date range, all the order lines will be modified with this change.
	• If a change order is received for a shipped order, the start ship date of the shipping date range must not be earlier than the start ship date of the original order.
Order Delivery Date (Requested)	Shows the Requested delivery date range.
Order Cancel Date	Shows the date on which the order will be considered as cancelled if it is not fulfilled by then.
Order Ship Date	Shows the order shipment date.
Order Delivery Date	Indicated the order delivery date.
Customer	Shows the customer. Click the **Customer** hyperlink to view the details of the customer.
Community	Shows the community that is created by the Sponsor to whom the Purchase Order belongs. Click the **Community** hyperlink to view the business rules set by the Sponsor for the community.
Order Amount	Shows the total amount of the order in the currency specified in the order.

Action	Description
Acknowledged Amount	Shows the total order amount calculated on the basis of the acknowledgement sent for this order. **Notes:** • The **Acknowledged Amount** field will be displayed as blank if you have not acknowledged the order. • The **Acknowledged Amount** field is displayed only if the order belongs to a community that has Acknowledgement in the choreography and the corresponding **Order Amount** field has been configured in the PO Acknowledgement Excel spreadsheet to be displayed on the page. • The charges specified in the order are considered when calculating the acknowledged amount. • The value of the acknowledged amount is the sum of the (acknowledged quantity * acknowledged price) for all the order lines.
Status	Shows the status of the order. The identifier of the status is also displayed in the panel.
Terms	Shows the terms of the order.
Freight Terms	Shows the freight terms of the order.
SCAC	Shows the Standard Carrier Alpha Code (SCAC), which is a unique 2-4 letter code used to identify transportation companies.
Drop Ship Order	Shows whether the order is a drop-ship order or not.
Header Charge	Shows the total charge provided to the Buyer for the order at the header level. Click the value of the header charge to view the Charges page, which displays the charge name and its value. The total charge is displayed in the currency specified in the order.

Action	Description
Additional Information	Click this hyperlink to view additional information about the order. When this is clicked, the following fields are displayed in the Primary Information panel:
	• **Acknowledgement Type** - Shows the Acknowledgement type configured by the Sponsor when creating the community.
	• **Transportation Method** - Shows the mode of transportation.
	• **Carrier Service Code** - Shows the carrier service code.
	• **SCAC** - Enter the Standard Carrier Alpha Code (SCAC), which is a unique 2-4 letter code used to identify transportation companies.
	• **Routing** - Shows the mode of routing.
	• **Buyer Tax ID** - Shows the Tax identifier of the Sponsor (Buyer). The value for Buyer Tax ID is passed in the order.
	• **Supplier Tax ID** - Shows the Tax identifier of the Partner (Supplier). The value for Supplier Tax ID is passed by the Partner when sending the Invoice.
	• **Tax Jurisdiction** - Shows the tax jurisdiction. You can also use this field to display the Tax Law Reference.
	• **Tax Exempt** - Shows whether the order is exempt from tax or not.
	• **PO Type** - Shows the purchase order type.
	• **Release #** - Shows the release number of the order.
	• **Contract #** - Shows the contract number of the order.
	• **Invoice Type** - Shows the type of the invoice.
	• **Transaction Type** - Shows the type of the transaction.
	• **Specification #** - Shows the specification number.
	• **Currency Conversion Rate** - Shows the currency conversion rate.
	• **User-Defined Fields** - Shows the user-defined fields added for an order at Order header level. The user-defined fields are displayed only if your Sponsor has configured them to be displayed on the Order Detail page.
Ship To	Shows the name, address, and identifier of the company to whom the order needs to be shipped.
	Note: The Buyer ID attribute is the Data Universal Numbering System (DUNS) number for the Sponsor that has been passed in the order XML. If the Buyer ID is not passed in the order, the Sponsor's DUNS number as entered in IBMSterling B2B Collaboration Network is displayed in the Order.
Bill To	Shows the name, address, and identifier of the company to whom the bill needs to be sent.
	Note: The Buyer ID attribute is the Data Universal Numbering System (DUNS) number for the Sponsor that has been passed in the order XML. If the Buyer ID is not passed in the order, the Sponsor's DUNS number as entered in Sterling B2B Collaboration Network is displayed in the order.

Action	Description
Event Log	Shows the dates on which the events are completed when an order is being processed. For example, in the Event Log panel, you can view the date on which the acknowledgement of the order was sent. You can also view whether the order has been rejected by you or cancelled by the Sponsor. An order is considered to be rejected by you if you send the acknowledgement of the order with zero quantity. An order is considered to be cancelled by a Sponsor if the Sponsor sends a changed order with all the line-level quantities as zero. You can view the documents pertaining to change order request, shipment, invoice, and payment. You can also view the date on which a shipment has been resent or cancelled. If a shipment has been cancelled, resent multiple times or sent for route planning, you can view entries for all the events. However, you can view only the latest shipment details by clicking the link displayed for the latest event. In the case of a cancelled shipment, the latest shipment details with acknowledged quantity as being zero are displayed. The Routing Request Sent for <Shipment number> event is displayed when you have sent a shipment for route planning. You can view the Create Shipment page by clicking the **Shipment Number** hyperlink but you cannot perform any task in this page except deleting the shipment that has been saved as a draft. When the route plan for the shipment has been received, the earlier hyperlink is disabled and a new hyperlink with the Routing Response Received for <Shipment number> event is displayed. You can then view the Create Shipment page by clicking the new Shipment number hyperlink and send the shipment or perform any other tasks related to the shipment. If the shipment has been deleted, the Routing Canceled Request Sent for <Shipment Number> event is displayed. You can view the date on which the shipment was deleted but the hyperlink to the shipment details page is disabled. **Note:** This panel is not displayed for new or change POs.

The following table describes the fields and actions described in the Order Line(s) panel on the Order Detail page. If you are viewing the details pertaining to a change PO, the Change Order Detail page is displayed.

Action	Description
Notes	Click this action corresponding to the selected Order Line(s) in the list to view the Sterling as a Service Applications pop-up window. The notes added at the line-level of the order are displayed. Notes added by Sponsor at the order line-level are indicated by the ▣ icon, and notes added by Partner at the order line-level are indicated by the ▣ icon. Enter your note in the Add Note panel and click**Add** to save the contents of the note.
View Schedules	Click this to view the schedules pertaining to the selected Order Line(s) in the list. The **View Schedules** dialog box is displayed with the details.
Field	Description

Action	Description
Notes	Click the 📝 icon corresponding to the Order Line(s) in the list to view the Sterling as a Service Applications pop-up window. The notes added at the line-level of the order are displayed. Notes added by Sponsor at the order line-level are indicated by the 📄 icon, and notes added by Partner at the order line-level are indicated by the 📄 icon. Enter your note in the Add Note panel and click **Add** to save the contents of the note.
Line Identifier	Shows the identifier of the order line.
Item	Shows the name of the item as known to the Partner. If you have configured an item rule such that your Item ID is same as your customer's Item ID, the hover help containing item attributes is displayed when you place your mouse over the icon adjacent to this field. This hover help is displayed only if your Sponsor has configured these attributes to display on Supplier Portal when configuring the corresponding template. Sterling Supplier Portal supports attributes Color, Size, Product, Sub Product, and General Description for the item in addition to the Item ID and Item Description.
Ordered Qty.	Shows the ordered quantity of the item.
UOM	Shows the unit of measure of the item.
Order Ship Date (Requested)	Shows the requested date range for the shipment.
Order Delivery Date (Requested)	Shows the requested date range for the delivery.
Unit Price	Shows the unit price of the item in the currency specified in the order.
Acknowledged Price	Shows the price of the item as acknowledged by you when sending the acknowledgement for this order. **Note:** • The **Acknowledged Price** field will be displayed only if this field has been configured as displayable in the PO Acknowledgement Excel spreadsheet. • The **Acknowledged Price** field will be displayed as blank if you have not acknowledged the order.
Line Charge	Shows the line charge provided to the Buyer for each order line in the order. Click the value of the line charge to view the Charges page, which displays the charge name and its value. The line charge is displayed in the currency specified in the order.
Status	Shows the status of the order. However, Payment is not displayed as a status at the order-line level.
Customer Item	Shows the name of the item as known to the customer. If you have configured an item rule so that your Item ID is different from your customer's Item ID, hover help is displayed when you place your mouse over the icon for this field. The hover help displays the item attributes if your Sponsor has configured the template to display these attributes and the Customer ID. Examples of these attributes are Color, Size, Product, Sub Product, General Description, Item ID, and Item Description.

Action	Description

»	Click » to view additional fields in the Order Line(s) panel:
	
	UPC Code
	    Shows the Universal Product Code of the item.
	
	GTIN
	    Shows the Global Trade Item Number of the item.
	
	Product Class
	    Shows the product class of the item.
	
	User-Defined Fields
	    Shows the user-defined fields that were added to the order at the Order Line level. The user-defined fields are only shown if your Sponsor has configured them to be displayed on the Order Detail page.

View Order Schedules

About this task

To view the schedule of an order, in the **Order Line(s)** panel of the Order Detail screen, select the check box against the corresponding Line Identifier of the order whose schedules you want to view, and click **View Schedules**. The View Schedules dialog box is displayed.

The following table describes the fields that make up the **Requested Line Item** panel in the Order Detail screen.

Field	Description
Line Identifier	Indicates the line number of the item.
Item	Indicates the name of the item.
UOM	Indicates the unit of measure of the item.
UPC Code	Indicates the Universal Product Code of the item.
Ordered Quantity	Indicates the ordered quantity of the item.
Order Ship Date (Requested)	Indicates the requested shipment date range.
Order Delivery Date (Requested)	Indicates the requested delivery date range.

The following table describes the fields that make up the **Manage Schedules** panel.

Field	Description
Quantity	Indicates the quantity of items ordered.
Ship Date	Indicates the actual shipment date. This should be a date that falls within the date range specified in the **Requested Ship Date** field.
Delivery Date	Indicates the actual delivery date. This should be a date that falls within the date range specified in the **Requested Delivery Date** field.

Chapter 15. Acknowledge an Order (Partner Task)

You can acknowledge an order either at the order level or order line level after the corresponding order is confirmed.

You can acknowledge an order either at the order level or order line level after the corresponding order is confirmed. However, an order can be acknowledged at the order line level only if your Sponsor has configured the community to which you belong in such a way that acknowledging an order by line item is allowed. If your Sponsor has sent an order with multiple order lines, you must acknowledge the order at the order line level by managing multiple schedules.

You can partially acknowledge an order depending on community configuration. The acknowledgment can be sent in multiple steps by adding part of the quantity at a time. The partially acknowledged quantity should satisfy the configured business rules. You can also exclude some of the order lines while sending an acknowledgment. The acknowledgment sent to your Sponsor will not contain the excluded orderlines.You can acknowledge an order in the following ways:

- Acknowledge an Order at the Order Level
- Acknowledge an Order at the Order Line Level

Acknowledge an Order at the Order Level

You can acknowledge an order at the order level.

Procedure

To acknowledge an order at the order level, follow these steps:

1. From the menu bar, click **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed on the Find Order page. Enter the **Order #** you want to search for. You can also select one of the following options:
   - **is**: The application searches for the exact order number.
   - **starts with**: The application searches for order numbers that start with the specified value.
3. Enter the search criteria and click **Search**.
4. The **Search List** panel is displayed with the list of orders. Select the check box against the order whose details you want to view and click **View Details**. Alternatively, you can click the corresponding **Order Number** hyperlink.
5. The Order Detail page is displayed. Click **Ack PO**.

   Notes:
   - The **Ack PO** task is available as a Related Task only if Acknowledgement is a part of the choreography of the community.
   - An order can be over acknowledged.
   - If an order has been shipped (either partially or completely), then the acknowledged quantity should be greater than the shipped quantity.
   - Acknowledgement cannot be sent for a fully invoiced order.

- A Sponsor can set up the configuration so the Supplier cannot edit the quantity on the acknowledgement.

6. The Create Acknowledgement page is displayed. Enter the appropriate values in the fields and perform one of the following tasks:
   - Click **Save Draft** to save the document in draft form and complete it later.
   - Click **Send Acknowledgement** to send the acknowledgement for the order to the Sponsor.
   - Click **Reject** to reject the order.
   - Click **Delete** to delete the draft form of the document. This button is enabled when you are viewing the latest saved draft.

   Note: If you know the Sponsor's Purchase Order number, you can directly acknowledge the order in the **Overview** panel of the Dashboard.

   The following table describes the fields and the action that make up the **Primary Information** panel on the Create Acknowledgement page.

Action	Description
Notes	Click this action to view the Sterling as a Service Applications pop-up window, which displays the notes added at the header-level of the acknowledgement or PO. Enter your note in the **Add Note** panel and click **Add** to save the contents of the note.
	In the **Notes** panel, notes added by Sponsor at the header-level of the acknowledgment or PO are indicated by the icon, and notes added by Partner at the header-level of the acknowledgment or PO are indicated by the icon. **Note:** • If the Sponsor has configured the application to carry over the notes added in PO to the acknowledgement, notes added by both Sponsor and Partner in the PO will be displayed in the **Notes** panel of the Sterling as a Service Applications pop-up window. • When PO notes are carried over to acknowledgment, no indicators will be provided to differentiate between notes of a PO and the notes of the corresponding acknowledgment. • When an acknowledgement is sent again with a new note, all the notes present in the previous acknowledgment will be sent along with the new note.
View Payment Terms	Click this to view the Payment Terms page that displays the payment terms for the order.
Field	**Description**

Action	Description
Order #	Shows the order number. Click the **Order Number** hyperlink to view the Order Detail page, which displays the details of the selected Order Number. Click the 🗒 icon to view the Sterling as a Service Applications pop-up window, which displays the notes added at the header-level of the acknowledgement or PO. Enter your note in the **Add Note** panel and click **Add** to save the contents of the note. In the **Notes** panel, notes added by Sponsor at the header-level of the acknowledgment or PO are indicated by the 🗒 icon, and notes added by Partner at the header-level of the acknowledgment or PO are indicated by the 🗒 icon. **Note:** • If the Sponsor has configured the application to carry over the notes added in PO to the acknowledgement, notes added by both Sponsor and Partner in the PO will be displayed in the **Notes** panel of the Sterling as a Service Applications pop-up window. • When PO notes are carried over to acknowledgment, no indicators will be provided to differentiate between notes of a PO and the notes of the corresponding acknowledgment. • When an acknowledgement is sent again with a new note, all the notes present in the previous acknowledgment will be sent along with the new note.
Order Date	Shows the date on which the order was created.
Order Amount	Shows the total amount of the order in the currency specified in the order.
Customer	Shows the details of the customer. Click the **Customer** hyperlink to view the details of the customer.
Community	Shows the community that is created by the Sponsor to whom the Purchase Order belongs. Click the **Community** hyperlink to view the details of the community.
Release #	Enter the release number of the order.
Contract #	Enter the contract number of the order.
Freight Terms	Enter the freight terms of the order.
Transportation Method	Enter the mode of transportation.
SCAC	Enter the Standard Carrier Alpha Code (SCAC), which is a unique 2-4 letter code used to identify transportation companies. Alternatively, click 🔍 to search for the SCAC.
Carrier Service Code	Enter the carrier service code.
Routing	Enter the mode of routing.
Transaction Type	Enter the type of transaction.
Currency Conversion Rate	Enter the currency conversion rate.
Header Charge	Shows the total charge provided to the Buyer for the order at header level. Click the value of the header charge to view the Charges page, which displays the charge name and its value. The total charge is displayed in the currency specified in the order.

Note:

- Some fields in the panel may be hidden or disabled by the Sponsor. Sponsors can also choose to make some of the fields mandatory
- The order of the fields may vary if the Sponsor has selected a different User Interface layout for this form.
- Irrespective of community configuration, the drop-ship PO cannot be over acknowledged.

The following table describes the fields and actions that make up the **Order Line(s)** panel on the Create Acknowledgement page.

Action	Description
Notes	Click this action corresponding to the selected Order Line(s) in the list to view the Sterling as a Service Applications pop-up window, which displays the notes added at the corresponding line-level of the acknowledgement or PO. Enter your note in the **Add Note** panel and click **Add** to save the contents of the note.
	In the **Notes** panel, notes added by Sponsor at the line-level of the acknowledgment or PO are indicated by the ▣ icon, and notes added by Partner at the line-level of the acknowledgment or PO are indicated by the ▣ icon. **Notes:**
	- If the Sponsor has configured the application to carry over the notes added in PO to the acknowledgement, notes added by both Sponsor and Partner in the PO will be displayed in the **Notes** panel of the Sterling as a Service Applications pop-up window.
	- When PO notes are carried over to acknowledgment, no indicators will be provided to differentiate between notes of a PO and the notes of the corresponding acknowledgment.
	- When an acknowledgement is sent again with a new note, all the notes present in the previous acknowledgment will be sent along with the new note.
Manage Multiple Schedules	Click this action pertaining to the selected Order Line(s) to manage the multiple schedules of the item in the list. The Manage Multiple Schedules dialog box is displayed.
Reset	Click this action to discard all the previous acknowledgments and revert all the changes to the initial acknowledgment status. **Note:** If the acknowledgement(s) sent previously has multiple schedules, then the line schedule is reset to acknowledged schedules and not to ordered schedules. This is a limitation.
Field	**Description**

Action	Description
Notes	Click the 📝 icon corresponding to the Order Line(s) in the list to view the Sterling as a Service Applications pop-up window. The notes added at the line-level of the order are displayed. Notes added by Sponsor at the order line-level are indicated by the 📄 icon, and notes added by Partner at the order line-level are indicated by the 📄 icon. Enter your note in the **Add Note** panel and click **Add** to save the contents of the note. **Notes:** • If the Sponsor has configured the application to carry over the notes added in PO to the acknowledgement, notes added by both Sponsor and Partner in the PO will be displayed in the **Notes** panel of the Sterling as a Service Applications pop-up window. • When PO notes are carried over to acknowledgment, no indicators will be provided to differentiate between notes of a PO and the notes of the corresponding acknowledgment. • When an acknowledgement is sent again with a new note, all the notes present in the previous acknowledgment will be sent along with the new note.
Line Identifier	Shows the identifier of the line.
Item	Shows the name of the item. If you have configured an item rule such that your Item ID is same as your customer's Item ID, the hover help containing item attributes is displayed when you hover your mouse over the icon adjacent to this field. This hover help is displayed only if your Sponsor has configured these attributes to display on Supplier Portal when configuring the corresponding template. Sterling Supplier Portal supports attributes Color, Size, Product, Sub Product, and General Description for the item in addition to the Item ID and Item Description.
Ordered Qty.	Shows the quantity of the item ordered in the order.
UOM	Shows the unit of measure of the item.
Ack'd Qty.	Shows the already acknowledged quantity of the item in the order.
Shipped Qty.	Shows the quantity of the item already shipped.
Invoiced Qty.	Shows the quantity of the item already invoiced.
Qty. to be Ack'd	Enter the quantity of the item to be acknowledged in an order. By default the remaining quantity of the item that needs to be acknowledged is displayed.
Order Ship Date (Requested) / Shipping Window	Shows the requested shipment date range. In case the shipment contains only shipping window orders then the literal will be shown as **shipping window**. If the shipment contains even one order which is not a shipping window orders then the literal will be shown as **order ship date**.
Order Delivery Date (Requested)	Shows the requested delivery date range.
Order Ship Date	Shows the order shipment date. **Note:** You can enter the order shipment date either beyond or before the requested shipment date based on the date tolerance configured by your Sponsor for the community.

| Action	Description
Line Charge	Shows the line charge provided to the Buyer for each order line in the order. Click the value of the line charge to view the Charges page, which displays the charge name and its value. The line charge is displayed in the currency specified in the order.
Order Delivery Date	Shows the order delivery date. **Note:** You can enter the order delivery date either beyond or before the requested delivery date based on the date tolerance configured by your Sponsor for the community. Click ≫ to view the additional fields in the panel. Following are the fields that are displayed: • Unit Price - Shows the unit price of the item in the currency specified in the order. You can also modify the unit price of the item as required. The modified price is displayed in the **Acknowledged Price** field of the Order Detail page. The Acknowledged Amount displayed on the Order Detail page is calculated based on the modified price. Ensure that you enter only numbers in this field. • Customer Item - Shows the customer item. If you have configured an item rule such that your Item ID is different from your customer's Item ID, item attributes are displayed in a hover help when you hover the mouse over the icon adjacent to this field. This hover help is displayed only if your Sponsor has configured these attributes and Customer ID to display on Supplier Portal when configuring the corresponding template. If your Sponsor has not selected this configuration, the hover help is not displayed. Sterling Supplier Portal supports attributes Color, Size, Product, Sub Product, and General Description for the item in addition to the Item ID and Item Description. • UPC Code - Shows the Universal Product Code of the item. • GTIN - Shows the Global Trade Item Number of the item. • Product Class - Shows the product class of the item.
Order Ship Date	Enter the order shipment date and time. Alternatively, you can click 🗓 to select the date, and 🕐 to select the time. **Note:** You can enter the acknowledge shipment date either beyond or before the requested shipment date based on the date tolerance configured by your Sponsor for the community.
Order Delivery Date	Enter the order delivery date and time. Alternatively, you can click 🗓 to select the date, and 🕐 to select the time.
Exclude	Select this check box for the order line that you want to exclude from an acknowledgment.

Notes:

• Some fields on the panel can be hidden or disabled by the Sponsor. Sponsors can also choose to make some of the fields mandatory.
• The order of the fields may vary if the Sponsor has selected a different User Interface layout for this form.

Acknowledge an Order at the Order Line Level

Sterling Supplier Portal enables you to acknowledge an order at the order line level.

About this task

To acknowledge an order at the order line level, follow these steps.

Procedure

1. In the **Order Lines** panel of the Create Acknowledgement screen, select the check box against the item for which you want to manage multiple schedules and click **Manage Multiple Schedules**.
2. The Sterling as a Service Applications dialog box is displayed. Select the check box against the schedule and enter the appropriate values in the fields.

   The following table describes the fields and actions that make up the **Requested Line Item** panel in the Sterling as a Service Applications dialog box.

Action	Description
Save	Click this to add the schedule.
Field	**Description**
Line Identifier	Indicates the line number of the item.
Item	Indicates the name of the item.
UOM	Indicates the unit of measure of the item.
UPC Code	Indicates the Universal Product Code of the item.
Ordered Quantity	Indicates the quantity of the item requested in the order line.
Order Ship Date (Requested) / Shipping Window	Indicates the order shipment date range. In case the shipment contains only shipping window orders then the literal will be shown as **shipping window**. If the shipment contains even one order which is not a shipping window orders then the literal will be shown as **order ship date**.
Order Delivery Date (Requested)	Indicates the order delivery date range.

The following table describes the fields and actions that make up the **Manage Schedules** panel in the Manage Multiple Schedules dialog box.

Action	Description
Delete	Click this to delete the schedule.
Add/Copy Row	Click **Add/Copy Row** to add a new row; • To add a row, enter the quantity in the **Add/Copy** field and click ![+] . • To copy a row, select the line that you want to copy and click ![+] . • To copy multiple records, select the lines that you want to copy, enter the quantity in the **Add/Copy** field, and click ![+] .
Field	**Description**
Quantity	Enter the quantity of the item.
Shipping Date	Enter the date on which the items are to be shipped. Alternatively, click ![calendar] to select the date. **Note:** You can enter the acknowledged shipment date either beyond or before the requested shipment date based on the date tolerance configured by your Sponsor for the community.

Action	Description
Delivery Date	Enter the date on which the items are to be delivered. Alternatively, click ⊞ to select the date. **Note:** You can enter the acknowledged delivery date either beyond or before the requested delivery date based on the date tolerance configured by your Sponsor for the community.

Note:

* Validation for date tolerance is performed at the line level. If a line has multiple schedules, the minimum and maximum dates from these schedules are used for validation at the order line level.
* Validation for date tolerance is performed only for the acknowledged quantity.

Chapter 16. Rejection of an Order by the Supplier

When an order is rejected in Sterling Supplier Portal , all the order-level tasks related to the order will be resolved.

If the order has all the order lines in either Rejected or Canceled status, then the tasks related to this order are also removed from the Next/Overdue task list.

The tasks are regenerated for a rejected order during this workflow:

1. The supplier re-acknowledges the order.
2. A change order is received to increase the order line quantity or add another order line to the rejected order.

Notes:

- Tasks are not regenerated when a change order arrives that changes the price, changes the date, or reduces the ordered quantity.
- No shipment tasks are resolved when the order is rejected. Examples of shipment tasks are *Routing Response Awaited* or *Ship the Shipment*.

Chapter 17. Delete a Draft Acknowledgement (Partner Task)

About this task

You can delete an acknowledgement that has been saved as a draft.

To perform this task, follow these steps.

Procedure

1. In the Home screen, click **Saved as Draft** in the **Overview** panel.
2. The Drafts screen is displayed. In the **Drafts** panel, click the link pertaining to the acknowledgement you want to delete.
3. The Create Acknowledgement screen is displayed. Click **Delete** to delete the draft form of the acknowledgement.

Chapter 18. View the Acknowledgement of an Order (Partner Task)

You can view the acknowledgement of an order. This feature is available if your Sponsor selected the Acknowledgement in the choreography for your community.

Procedure

To view the acknowledgment for an order, follow these steps:

1. From the menu bar, click **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed on the Find Order page. Enter the **Order #** you want to search for. You can also select one of the following options:
   - **is**: The application searches for the exact order number.
   - **starts with**: The application searches for order numbers that start with the specified value.
3. Enter the search criteria and click **Search**.
4. The **Search List** panel is displayed with the list of orders. Select the check box against the order whose details you want to view and click **View Details**. Alternatively, you can click the corresponding **Order Number** hyperlink.
5. The Order Detail page is displayed. Click **View Acknowledgement**. The Acknowledgement Detail page is displayed.

   The following table describes the fields that make up the **Primary Information** panel on the Acknowledgement Detail page.

Action	Description
Notes	Click **Notes** to enter additional information about the acknowledgment. Write your note in the Add Note dialog box and click **Add** to save the note.
Field	**Description**
Order #	Shows the order number. Click the corresponding **Order Number** hyperlink to view the Order Detail page, which displays the details of the selected Order Number.
Order Date	Shows the date the order was created.
Order Amount	Shows the total order amount, in the currency specified in the order.
Customer	Shows the identifier of the customer. Click the **Customer** hyperlink to view the Customer Detail page, which displays the details of the corresponding customer.
Community	Shows the community that is created by the Sponsor to which the Purchase Order belongs. Click the corresponding **Community** hyperlink to view the business rules set for the community by the Sponsor.
Release #	Shows the release number of the order.
Contract #	Shows the contract number.
Freight Terms	Shows the freight terms of the order.

Action	Description
Transportation Method	Shows the mode of transportation.
Carrier Service Code	Shows the carrier service code.
SCAC	Enter the Standard Carrier Alpha Code (SCAC), which is a unique 2-4 letter code used to identify transportation companies.
Routing	Shows the mode of routing.
Transaction Type	Shows the type of transaction.
Currency Conversion Rate	Shows the currency conversion rate.
User-Defined Fields	Enter the user-defined fields (UDF) you want to search for. You can also select one of the following options: • **is**: The application searches for the exact user-defined field value. • **starts with**: The application searches for the user-defined fields that start with the specified value. If the Partner belongs to more than one community, you must select a **Community** to view the user-defined fields on the Search Criteria page.

The following table describes the fields that make up the **Additional Information** panel on the Acknowledgement Detail page.

Field	Description
User-Defined Fields	Shows the user-defined fields that are carried over from the Order page. The user-defined fields are displayed only if your Sponsor has configured them to be displayed on the Acknowledgement Details page.
Additional Information	Click this hyperlink to view more user-defined fields.

The following table describes the fields and actions that make up the **Order Line(s)** panel in the Acknowledgement Detail page.

Action	Description
Notes	Click this to enter additional information. Enter your note in the **Add Note** dialog box and click **Add** to save the contents of the note.
View Multiple Schedules	Click this to view the multiple schedules pertaining to the selected item in the list. The **View Multiple Schedules** dialog box is displayed.
Field	**Description**
Line Identifier	Shows the identifier of the line.
Item	Shows the name of the item. If you have configured an item rule such that your Item ID is same as your customer's Item ID, the hover help containing item attributes is displayed when you place your mouse over the icon adjacent to this field. This hover help is displayed only if your Sponsor has configured these attributes to display on Supplier Portal when configuring the corresponding template. Sterling Supplier Portal supports attributes Color, Size, Product, Sub Product, and General Description for the item in addition to the Item ID and Item Description.

Action	Description
Ordered Qty.	Shows the ordered quantity of the item.
UOM	Shows the unit of measure of the item.
Ack'd Qty.	Enter the acknowledged quantity of the item.
Order Ship Date (Requested) / Shipping window	Shows the Requested shipment date range. In case the shipment contains only shipping window orders then the literal will be shown as **shipping window**. If the shipment contains even one order which is not a shipping window orders then the literal will be shown as **order ship date**.
Order Delivery Date (Requested)	Shows the Requested delivery date range.
Order Ship Date	Shows the order shipment date.
Order Delivery Date	Enter the order delivery date.

≫	Click ≫ to view the additional fields in the panel:
	
	Unit Price
	
	    Shows the unit price of the item, in the currency specified in the order.
	
	    If you changed the unit price of the item when you sent the acknowledgement, the acknowledged price is displayed.
	
	Customer Item
	
	    Shows the name of the item as known to the customer.
	
	    If you have configured an item rule so that your Item ID is different from your customer's Item ID, hover help is displayed when you place your mouse over the icon for this field. The hover help displays the item attributes if your Sponsor has configured the template to display these attributes and the Customer ID.
	
	    Examples of these attributes are Color, Size, Product, Sub Product, General Description, Item ID, and Item Description.
	
	UPC Code
	
	    Shows the Universal Product Code of the item.
	
	GTIN
	
	    Shows the Global Trade Item Number of the item.
	
	Product Class
	
	    Shows the product class of the item.
	
	User-Defined Fields
	
	    Shows the user-defined fields that were added for an acknowledgment at the Order Line level. The user-defined fields are only displayed if your Sponsor has configured them to be displayed on the Acknowledgement Detail page.

Chapter 19. Print an Order (Partner Task)

Sterling Supplier Portal allows you to print orders.

About this task

You can only print an order after it is marked as "Read." You cannot print an order that has a status of "Draft."

Procedure

To print an order, follow these steps.

1. From the menu bar, click **My Documents** > **Orders**. The **Search Criteria - Find Order** panel is displayed on the Find Order page.
2. Enter the **Order #** you want to search for. You can also select one of the following options:
   - **is**: The application searches for the exact order number.
   - **starts with**: The application searches for order numbers that start with the specified value.
3. Enter the search criteria and click **Search**. The **Search List** panel is displayed with the list of orders.

   Note: Make sure the **Read Orders** option is selected, otherwise the **Print** button is not available.
4. From this list, select the check box for the order you want to print and click **Print**. Alternatively, you can go to the Order Detail page for the order and click **Print**.

   Note: You can select only one order at a time to print.
5. In the File Download dialog, click **Open**. A PDF version of the order is displayed.
6. Select **File > Print**.

   The following section is an example of a purchase order:

   The following fields appear in the PDF version of the order:

Field	Description
Purchase Order Number	Shows the order number.
Ship To	Shows the name, address, and identifier of the company to whom the order needs to be shipped.
Customer Name	Shows the name of the customer.
Bill To	Shows the name, address, and identifier of the company to whom the bill needs to be sent.
Order Date	Shows the date on which the order was placed.
Community	Shows the community that is created by the Sponsor to whom the Purchase Order belongs.
Freight Terms	Shows the freight terms of the order.
SCAC	The Standard Carrier Alpha Code (SCAC), which is a unique 2-4 letter code used to identify transportation companies.
Order Shipment Date (Requested)	Shows the requested shipment date.
Order Delivery Date (Requested)	Shows the requested delivery date.
Order Cancel Date	Shows the date on which the order will be considered as cancelled if it is not fulfilled by then. **Note:** In the case of a range of dates, only the end date is displayed.
Order Amount	Shows the total amount of the order in the currency specified in the order.
Acknowledged Amount	Shows the total order amount calculated on the basis of the acknowledgement sent for this order. **Note:** • The charges specified in the order are considered when calculating the acknowledged amount. • The value of the acknowledged amount is the sum of the (acknowledged quantity * acknowledged price) for all the order lines.
Acknowledged On	Shows the date and time at which the order was Acknowledged. **Note:** In the case of multiple acknowledgments, this is the latest date/time.
Ref1 – Ref5	Up to five order header-level fields that are defined by the Sponsor, along with their corresponding values. Any fields that are not defined are not displayed.
Header-level Notes	Header-level notes about the order (added from the Order Detail page). Each note is on a separate line.
Line ID	Shows the identifier of the order line.
Item	Shows the item description and item ID (in parentheses) as known to the Partner. This section may include item-level notes (added from the Order Detail page), each of which is on a separate line. **Note:** If the Customer Item ID is different from Supplier Item ID, then the customer Item ID is displayed in brackets. Otherwise, it is not displayed. In the example above, this is displayed as **Reebok Shoes (RBK001) [Customer Item: REE9980]**.
UOM	Shows the unit of measure of the item.

Field	Description
Ordered Qty (Acknowledged)	Shows the ordered quantity of the item. **Note:** If the line is acknowledged, the acknowledged quantity appears in parentheses (whether the acknowledged quantity is the same or different than the ordered quantity). If the line is not acknowledged, only the ordered quantity appears.
Order Ship Date (Requested)	Shows the requested date for the order to ship. **Note:** If the committed ship date is different from the requested ship date, then it will appear in parentheses. Otherwise, it will not appear. In the case of a range of dates, only the end date is displayed.
Order Delivery Date (Requested)	Shows the requested date for the order to be delivered. **Note:** If the committed delivery date is different from the requested delivery date, then it will appear in parentheses. Otherwise, it will not appear. In the case of a range of dates, only the end date is displayed.
Unit Price	Shows the unit price of the item in the currency specified in the order.
References	Up to five order-line level fields that are defined by the Sponsor, along with their corresponding values. Each field-value pair appears on a separate line. Any fields that are not defined are not displayed

Chapter 20. Pack an Order or a Shipment (Partner Task)

Your Sponsor can require partners in a community to pack items in cases, pallets, or both.

If your Sponsor requires the packing step, you will not be able to send a shipment before you pack the complete shipment and generate the corresponding container labels for the cases or pallets.

If your Sponsor has not made packing a mandatory task for your community, you will not be able to perform the packing process or generate container labels.

You can pack an order from the Sterling Supplier Portal Home page. You can pack a shipment from the Create Shipment page.

Note: As a best practice, do not pack an order or a shipment in more than 99 containers.

Pack an Order from the Home Page

If you know the order number, you can pack the order from the Sterling Supplier Portal Home page.

About this task

The following rules apply to packing an order or shipment:
- You have to pack the complete order or shipment at one time because the packing information cannot be saved. If you exit the Pack Shipment Wizard, you will have to pack the order or shipment all over again.
- If a shipment contains multiple orders, you will pack all the orders in the shipment, even though you only entered one order number.
- The Sponsor can require you to send an acknowledgement for an order. If the acknowledgement is required, make sure to send it before you pack the order. Otherwise, you will receive the following error when you try to pack the order:
  ```
  Order cannot be packed in this status.
  ```

Procedure

To pack an order from the Home page, follow these steps:
1. On the Home page, enter the **Order #** in the Overview panel.
2. Click **Pack**. Depending on the tasks that you have completed for this order, one of the following pages opens:

   Create Shipment page

   > If you have not created a draft shipment for this order, the Create Shipment page is displayed in the Pack Shipment Wizard. You can use the Line Items panel to add or delete order lines from the shipment.

   > When you are done working with the order lines, click **Save**.

   Draft Shipment List page

If you have created multiple draft shipments for this order, the Draft Shipment List page is displayed in the Pack Shipment Wizard. Select the shipment that you want to pack, and click **Proceed**.

Record Packing and Print Container Labels page

If you have created one draft shipment for the order, the Record Packing and Print Container Labels page is displayed in the Pack Shipment Wizard.

Manage Profile Packing page

If the GS1 prefix for your company has not been configured, the following message is displayed:

Do you want to configure GS1 prefix and proceed to packing?

Click **OK** to open the Manage Profile Packing page in the Pack Shipment Wizard. Enter your company's GS1 prefix and click **Save**.

To return to the Sterling Supplier Portal Home page, click **Cancel** on the Manage Profile Packing page.

3. Use the Record Packing and Print Container Labels page to pack the shipment.

The following table describes the actions and fields on the Record Packing and Print Container Labels page:

Field	Description
Shipment #	Shows the shipment number.
Order #	Shows the order number.
	If there are multiple orders in a shipment, **Multiple** is displayed.
Item	Shows the name and description of the item that is being packed.
	If there are two shipment lines with the same Item ID, these are displayed as two different items in the "Labels for items in their original packing" panel.
UOM	Shows the unit of measurement for the item.
Case Qty	Enter the number of units that you are packing in a case.
	The following rules apply to defining the case quantity:
	• You cannot pack the units for one item in both a case and pallet.
	• The case quantity that you enter for this shipment is used as the default case quantity the next time you pack the same item.
	• If your Sponsor made Packing a mandatory task and selected only the Pallet option for your community, **Case Qty** is not displayed.
	• If you enter a value in the **Case Qty**, the **Plt Qty** field is disabled.
	• If you enter zero for the case quantity, the **Plt Qty** field is enabled.
# Cases	Shows the number of cases in the prepacked container.
	When you enter the **Case Qty**, Sterling Supplier Portal automatically calculates the **# Cases**.
	If your Sponsor made Packing a mandatory task and selected only the Pallet option for your community, **# Cases** is not displayed.

Field	Description
Plt Qty	Enter the number of item units that you are packing on a pallet. The following rules apply to defining the pallet quantity: • You cannot pack the units for one item in both a case and pallet. • The pallet quantity that you enter for this shipment is used as the default pallet quantity the next time you pack the same item. • If your Sponsor made Packing a mandatory task and selected only the Case option for your community, **Plt Qty** is not displayed. • If you enter a value in the **Plt Qty**, the **Case Qty** field is disabled. • If you enter zero for the pallet quantity, the **Case Qty** field is enabled.
# Plts	Shows the number of pallets in the prepacked container. When you enter the **Plt Qty**, Sterling Supplier Portal automatically calculates the **# Plts**. If your Sponsor made Packing a mandatory task and selected only the Case option for your community, **# Plts** is not displayed.
Loose Qty	Shows the number of loose units for the item. When the **# Cases** and **# Pallets** fields are set to zero, all items are counted as loose quantity.
Total	Shows the total number of units that must be packed for the item. Sterling Supplier Portal calculates the total number of units as the sum of the following entries: • **Case Qty** multiplied by **# Of Cases** • **Pallet Qty** multiplied by **# Of Pallets** • **Loose Qty**
Total Cases	Shows the total number of cases in the prepacked container.
Total Pallets	Shows the total number of pallets in the prepacked container.
Total Qty	Shows the total number of units for all the items in the prepacked container.

4. To pack the unpacked shipment lines, click **Next**. The Container Build panel is displayed.

   Tip: If you want to start over on the packing process, click **Previous**. The Pack Shipment Wizard is refreshed and you can pack the order again.

5. Use the Container Build panel to pack the loose units of the items.

   The following table describes the actions and fields that make up the Container Build panel:

Action	Description
Close Container	When you click **Close Container**, Sterling Supplier Portal performs the following updates: • The units in the **Pack Qty** field are packed in the container and the **Pack Qty** is set to zero. • The **Total Loose Units** field is set to the value in the **Yet to Pack** field.
Field	Description

Action	Description
Shipment #	Shows the shipment number.
Order #	Shows the order number. If there are multiple orders in a shipment, **Multiple** is displayed.

Container is a	Select one of the following options:
	
	Case
	
	     Pack the loose units in a case.
	
	Pallet
	
	     Pack the loose units on a pallet.
	
	The display of the **Case** and **Pallet** options is controlled by the choreography your Sponsor defined for the community:
	• If your Sponsor did not make Packing a mandatory task, you can select either **Case** or **Pallet**.
	• If your Sponsor made Packing a mandatory task and specified that both cases and pallets can be used, you can select either **Case** or **Pallet**.
	• If your Sponsor made Packing a mandatory task and specified that only cases can be used, you can only select **Case**.
	• If your Sponsor made Packing a mandatory task and specified that only pallets can be used, you can only select **Pallet**.

Enter Item	Enter the identifier of the item that you are packing manually. When you enter an Item ID, the **Pack Qty** value increases by one and the **Yet to Pack** value decreases by one. If there are two shipment lines with the same Item ID, pack the first line completely and then pack the other line.
Item	Shows the name and description of the item that is being packed.
UOM	Shows the unit of measurement for the item.
Total Loose Units	Shows the total number of loose units for the item.
Yet to Pack	Shows the number of loose units that have not been packed in a case or pallet.
Pack Qty	Shows the number of loose units that are packed in a case or pallet.
Packing Instruction	Shows the packing instructions for the line item. The packing instructions for the complete order are displayed next to the **Close Container** button at the header level. If the shipment has multiple orders, the shipping instructions are displayed in a separate row for each order.
Total Cases	Shows the total number of cases in the prepacked container and the number of cases that were used to pack the loose units.
Total Pallets	Shows the total number of pallets in the prepacked container and the number of pallets that were used to pack the loose units.
Total Qty	Shows the total number of units for the order. The total quantity includes the following entries: • All the items in the prepacked container • The cases and pallets that were used to pack the loose units

6. When you are done packing the loose items, click **Finish**.

Note: You have to pack the complete order or shipment at one time. The packing information cannot be saved. If you close the Pack Shipment Wizard or click **Finish** without packing the shipment completely, a confirmation message is displayed. Click **OK** to proceed to the next step without saving the packing information.

7. After you click **Finish**, the container labels are displayed in PDF format. After you have generated and printed the container labels, the Record Packing and Print Container Labels page is displayed again.

8. To pack more orders or shipments, repeat steps 1 through 7.

Pack a Shipment from the Create Shipment Page

You can pack a shipment from the Create Shipment page.

About this task

The **Ship PO** task is only available on the Order Detail page if your Sponsor specified the ASN in the choreography for your Sterling Supplier Portal community.

The following rules apply to packing a shipment:

- You must pack the complete order or shipment at one time because the packing information cannot be saved. If you exit the Pack Shipment Wizard, you will have to pack the order or shipment all over again.
- You cannot "over pack" items. You cannot exceed the Shipment Line Quantity in a draft shipment.
- You cannot change the quantity after you pack a shipment.

Procedure

To pack a shipment, follow these steps:

1. From the menu bar, click **My Documents** > **Orders**. The Search Criteria panel is displayed on the Find Order page.
2. Enter the search criteria and click **Search**. The Search List panel displays the orders.
3. Select the order that you want to ship and click **View Details**. You can also click the **Order Number** hyperlink.
4. On the Order Detail page, click **Ship PO**. The Create Shipment page is displayed.
5. Use the Containers panel to add information about each container, such as the gross weight.
6. In the Containers panel, click **Pack Shipment**. This button is only displayed if the shipment is saved as a draft shipment.
7. When the Pack Shipment Wizard opens, you can pack the shipment. For more information about the Pack Shipment Wizard, refer to "Pack an Order from the Home Page" on page 71.
8. After you pack and save a shipment, you can click **View Container Details** to add additional information for the containers. If your sponsor has configured the following fields in Sterling Supplier Portal, you can enter the fields for each container:
   - Lot Number
   - Manufacturing Date

- Quantity

What to do next

If you want to reduce the shipped quantity for a shipment, you must reduce the packed quantity before you reduce the shipped quantity.

To reduce the packed quantity, follow these steps:

1. Click **Remove Containers** in the Containers panel of the Create Shipment page. Sterling Supplier Portal resets the packed quantity to zero.
2. You can then reduce the shipped quantity and click **Pack Shipment** in the Containers panel of the Create Shipment page.

Chapter 21. View the Details of a Container (Partner Task)

About this task

After you have started packing an order or a shipment, you can view the details of a container in which the items are packed. You can view the number of item units that are packed in cases and pallets.

To view the details of a container, follow these steps.

Procedure

1. From the menu bar, navigate to **My Documents** > **Shipments**.
2. The **Search Criteria - Find Shipment** panel is displayed in the Find Shipment screen. Enter the search criteria and click **Search**.
3. The results of the search are displayed in the **Search List** panel of the Search Criteria screen. From the list of shipments, select the shipment that has already been packed in containers, and click **View Details**.
4. The Shipment Detail screen is displayed. In the **Containers** panel, click **Container Details**.

   The Container Details dialog box containing the **Primary Info** panel, **Container SCM (Case)** panel, and **Container SCM (Pallet)** panel is displayed.

   The following table describes the fields that make up the **Primary Info** panel in the Container Details dialog box:

Field	Description
Shipment #	Indicates the shipment number.
Customer	Indicates the name of the customer.
SCAC	Indicates the Standard Carrier Alpha Code (SCAC), which is a unique 2-4 letter code used to identify transportation companies.
Carrier Service Code	Indicates the carrier service code of the shipment.

   The following table describes the fields that make up the **Container SCM (Case)** panel in the Container Details dialog box:

Field	Description
Item	Indicates the name of the item that is packed. The description of the item is also displayed adjacent to the item name.
Pack Qty	Indicates the packed units of the item in the case.

   The following table describes the fields that make up the **Container SCM (Pallet)** panel in the Container Details dialog box:

Field	Description
Item	Indicates the name of the item that is packed.
Pack Qty	Indicates the packed units of the item in the pallet.

Chapter 22. Ship an Order (Partner Task)

You can use Sterling Supplier Portal to manage the shipping process for your orders. When you ship an order, you are completing the Advance Shipment Notification (ASN) process for the order.

About this task

This topic describes the default layout of the Create Shipment page:

- The Sponsor might have created the page layout to hide, disable, or change the order of some of the fields.
- The Sponsor selects which fields are required.

The following rules apply to shipping an order:

Ship PO Task

> The Ship PO task is only available as a Related Task on the Order Detail page if the choreography of the community includes the ASN.

Overshipping

> Your Sponsor can configure the community to allow you to ship a larger quantity than the requested quantity in the order. This feature is referred to as *overshipping* or an *overshipment*.

> If overshipping is allowed for the community, and the first shipment that is created equals the acknowledged quantity, you cannot create a new shipment that contains additional items.

Shipping Date Range

> An order can contain a shipping window that spans multiple days.

> If the acknowledgment is not a part of the choreography of your community, Sterling Supplier Portal validates the shipping date range against the requested dates the Sponsor specified in the order.

Carrier Labels

> Your Sponsor can configure your community to allow you to generate carrier labels. For these communities, you can only manage one container for each shipment.

> You can only generate carrier labels for domestic United States shipments. You cannot send shipments to other countries.

> Sterling Supplier Portal supports carrier labels for Federal Express, United States Postal Service (USPS), and United Parcel Service (UPS).

Route Planning

> An order might require route planning. You must send the shipment for that order to the Sponsor for route planning before you send the order to the Sponsor.

> If your Sponsor sends you an order that requires route planning, the following buttons are available when you first open the Create Shipment page:
> - Send Routing Request

- Generate Packing Slip
- Save Draft
- Pack Shipment
- Generate Container Labels

When you send the shipment to the Sponsor for route planning, the Sponsor plans the route and updates the carrier information, pickup time, and other shipment attributes.

As a best practice, the Sponsor will send the route plan back to you the same day. If you do not receive the route plan by the end of that day, the **Routing response for <Shipment number> due** task is displayed in the Overdue Tasks panel of the Dashboard. You can contact your Sponsor to find out about the route plan for the shipment.

When you receive the route plan for the shipment, the fields that the Sponsor changed are automatically updated on the Create Shipment page. For example, if your Sponsor has modified the mode of routing, the **Routing** field in the Transportation Details panel is automatically updated when you receive the route plan.

After you send the shipment for route planning, you cannot modify any field on the Create Shipment page.

Packing Containers

Your Sponsor can make packing items in cases or pallets a mandatory task for your community.

If packing is required, you cannot send a shipment until you perform the following steps:

1. Pack the complete shipment in cases, pallets, or both.
2. Generate the container labels for the cases or pallets.

If your Sponsor has not made packing a mandatory task for your community, you cannot perform the packing process or generate container labels.

Sterling Supplier Portal provides these additional options for working with shipments:

- If you know the Sponsor's Purchase Order number, you can ship the order from the Overview panel of the Dashboard. When you click **Ship** in the Overview panel of the Dashboard, the Create Shipment page is displayed.
- If a draft shipment exists for the order, the Draft Shipment page is displayed when you click **Ship** in the Dashboard.
- If you have created multiple draft shipments for the order, the Draft Shipment List page is displayed when you click **Ship** in the Dashboard. You can select the shipment that you want to send and click **View Details**.

Procedure

To ship an order, follow these steps:

1. From the menu bar, click **My Documents** > **Orders**. The Search Criteria - Find Order panel is displayed on the Find Order page.
2. Enter the **Order #** you want to search for. You can also select one of the following options:
   - **is**: The application searches for the exact order number.

- **starts with**: The application searches for order numbers that start with the specified value.

3. Enter the search criteria and click **Search**. The Search List panel displays the list of orders.

4. Select the order that you want to ship and click **View Details**. You can also click the **Order Number** hyperlink. The Order Detail page is displayed.

5. Click **Ship PO**. The Create Shipment page is displayed.

   The following table describes the buttons on the Create Shipment page:

Button	Description
Save Draft	Save a document in draft form and complete it later.
Send Routing Request	Send the shipment to your Sponsor for route planning. If this button is enabled, all buttons on the Create Shipment page are disabled except for **Save Draft**, **Generate Packing Slip**, and **Delete**: • When you send the shipment for route planning, the shipment is saved as a draft. The draft shipment contains read-only fields. • If you want to replace this shipment, you can delete the shipment and create a new shipment. • Until you receive the route plan from your Sponsor, the only task you can perform is to generate a packing slip for the shipment.
Generate Packing Slip	Generate and print a packing slip. This button is only available if your Sponsor configured the community to allow you to generate a packing slip.
Generate Carrier Label	Generate and print a carrier label. This button is only available if your Sponsor configured the community to allow you to generate carrier labels. The Sponsor also must have completed the carrier integration process with IBM.
Regenerate Carrier Label	Generate and print an updated carrier label. This button is only available after you have generated a carrier label for the shipment.
Reprint Carrier Label	Reprint a carrier label. This button is only available after you have generated a carrier label for the shipment.
Generate Container Label	Generate and print container labels for the cases or pallets that were used to pack the shipment. This button is only available if the following conditions are satisfied: • Your Sponsor configured the community to require you to pack items in cases, pallets, or both. • Your Sponsor configured the community to require you to generate container labels. • The packing is in progress or complete.

Button	Description
Send ASN	Send the ASN to the Sponsor. When you send the shipment to the Sponsor after you receive the route plan, the draft form of the shipment is deleted and a new shipment is created with the same shipment number. If you changed the quantity in the shipment after packing the shipment, you are notified about this change when you click **Send ASN**.
Delete	Delete the draft form of the ASN. This button is only available when you are viewing the current draft of the shipment.

The following table describes the fields in the Shipping Information panel on the Create Shipment page:

Action	Description
Notes	Opens a Sterling as a Service Applications pop-up window, which displays the notes that were added at the header level of the corresponding PO. In the Notes panel, the icon indicates notes that were added by the Sponsor at the header level of the PO. The icon indicates notes that were added by the Partner at the header level of the PO. The Sponsor can configure the application to copy the notes from the PO to the shipment. Notes that the Sponsor and Partner added to the PO are displayed in the Notes panel.

Field	Description
Shipment #	Shows the default shipment number. This field is required and is automatically generated when you open the Create Shipment page. However, you can enter a new shipment number. Click the icon to open the Sterling as a Service Applications pop-up window, which displays the notes that were added at the header level of the corresponding PO. The following rules apply to shipment numbers: • For a community that uses ANSI X12 EDI, the shipment number can be from 2 to 30 characters. • For a community that uses EDIFACT, the shipment number can be from 1 to 35 characters. • For a community that uses Sterling XML, the shipment number can be from 1 to 40 characters. • If the order that corresponds to this shipment requires route planning, you cannot edit the **Shipment #**. This field is automatically populated when the shipment is saved as a draft or sent for route planning.

Action	Description
Customer	Shows the name of the customer. Click the **Customer** hyperlink to view information about the customer.
Community	Shows the community you are using to work with the Sponsor. Click the **Community** hyperlink to view information about the community.
Shipment On	Enter the date and time the shipment will be sent. You can also click 🗓 to select the date and click 🕐 to select the time. **Note:** If you will send this shipment for route planning, the **Shipment On** field is required.
Weight	Enter the weight of the order and select the unit of measurement. The following rules apply to specifying the weight: • If you will send the shipment for route planning, the weight is required. • For orders that require route planning, you can only select **Kilogram**, **Ton**, or **Pounds**. • The Weight field is disabled when you resend a shipment that you sent earlier for route planning.
Order Delivery Date	Enter the date and time the shipment is expected to be delivered. You can also click 🗓 to select the date and click 🕐 to select the time.
Volume	Enter the volume of the order and select the unit of measurement. The following rules apply to specifying the volume: • If you will send the shipment for route planning, the volume is required. • For orders that require route planning, you can only select **Gallon**, **Cubic Feet**, or **Cubic Meters**. • The Volume field is disabled when you resend a shipment that you sent earlier for route planning.
Perishable Allowed	Select this option if perishable items are allowed in the shipment.
Hazmat Allowed	Select this option if hazardous items are allowed in the shipment.
Drop Ship Shipment	Shows whether this is a drop ship shipment.
Packing Status	Shows the status of the packing process: • Not Started • In Progress • Completed

The following table describes the fields in the Transportation Details panel on the Create Shipment page:

Field	Description
# of Cartons	Enter the number of cartons included in the shipment. By default, this field shows the number of cartons that were used when you packed the shipment.

Field	Description
# of Pallets	Enter the number of pallets included in the shipment. By default, this field shows the number of pallets that were used when you packed the shipment.
SCAC	Enter the Standard Carrier Alpha Code (SCAC), which is a unique code used to identify transportation companies. You can also click 🔍 to select the SCAC from the SCAC and Carrier Service List page. The SCAC field is disabled when you resend a shipment that you sent earlier for route planning. If you want to generate a carrier label for this shipment, ensure that you enter the same SCAC that your Sponsor configured during the Carrier Integration process.
Carrier Service Code	Select the carrier service code of the shipment.
BOL #	Enter the Bill of Lading number for the shipment.
Pro #	Enter the Progressive (PRO) number for the shipment.
Transportation Method	Select the mode of transportation.
Routing	Enter the mode of routing for the shipment.
Freight Terms	Enter the payment method for the shipment. If your Sponsor configured the community to allow you to generate tracking numbers and carrier labels, Sterling Supplier Portal always uses **Prepaid** as the freight term, even if you enter **Collect**.
Equipment Type	Select the equipment that will be used to deliver the shipment.
Routing Attribute	Select the Routing Attribute details for the shipment.

If your Sponsor configured the community to allow you to generate tracking numbers and carrier labels, the Containers panel is displayed on the Create Shipment page. You can only manage one container for each shipment in this community.

The following table describes the fields in the Containers panel:

Action	Description
Remove Containers	Delete the selected container.
Add/Copy Row	Adds a new row: • To add rows, enter the number of rows in the **Add/Copy** field and click ➕ . • To copy a row, select the line that you want to copy and click ➕ . • To copy multiple records, select the lines that you want to copy, enter the number of rows in the **Add/Copy** field, and click ➕ .
Pack Shipment	Pack the shipment in containers. The **Pack Shipment** button is only displayed if the shipment has been saved as a draft.

Action	Description
Repack Shipment	Pack the shipment again. The **Repack Shipment** is only displayed if the packing is in progress or complete.
View Container Details	Opens the View Container Details page, where you can view up to 1000 containers for your shipment. If your sponsor configured the following fields, you can add the entries for each container: • Lot Number • Manufacturing Date • Quantity The **View Container Details** button is only available if the packing is in progress or complete.
Show All Containers	Opens the Container Details page, where you can view a list of 30 containers at a time. The **Show All Containers** button is only displayed if there are more than 30 containers. You can perform the following tasks on the Container Details page: • Modify the container details and click **Save**. • Select an item and click **Remove Containers** to delete a container from the shipment.

Field	Description
Container Seq. #	Enter the sequence number of the container.
Container #	Enter the container number. By default, this field shows the container that was used to pack the shipment.
Container Type	Select the container type. **Note:** If you are packing the shipment in containers and generating container labels, ensure that you do not change the default container type that is shown here.
Seal #	Enter the seal number of the container.
Height	Enter the height of the container. The default value is the height that your Sponsor configured for the default container in this community.
Width	Enter the width of the container. The default value is the width that your Sponsor configured for the default container in this community.
Length	Enter the length of the container. The default value is the length that your Sponsor configured for the default container in this community.
Size UOM	Select the unit of measurement. The default value is the unit of measurement that your Sponsor configured for the default container in this community.
Tracking #	Shows the tracking number of the container: • If you are allowed to edit this field, you can enter the tracking number for the container. • If this field is read-only, the tracking number is automatically populated when you generate the carrier label.
Gross Weight	Enter the gross weight of the container.
Weight UOM	Select the unit of measurement for the gross weight.

The following table describes the fields in the Ship To panel on the Create Shipment page:

Field	Description
Company	Enter the name of the company that is receiving the shipment.
First Name	Enter the given name (first name) of the contact person.
Last Name	Enter the family name (last name) of the contact person.
Address Line 1	Enter the first line of the company address.
Address Line 2	Enter the second line of the address, if applicable.
Buyer ID	Enter the Buyer ID of the company that is receiving the shipment.
Phone	Enter the phone number of the contact person. The phone number is required if you want to generate a tracking number and print a carrier label.
City	Enter the city of the company office.
State	Enter the state or province of the company office.
Zip	Enter the postal code of the company office.
Country	Enter the country or region of the company office. **Note:** You can only generate a carrier label for shipments that are being delivered within the United States.

The following table describes the fields in the Ship From panel on the Create Shipment page:

Field	Description
Location ID	Select the required Location ID. The ship from locations in the list are based on the locations your Sponsor defined for the community.
Company	Enter the name of the company that is shipping the freight.
First Name	Enter the given name (first name) of the contact person.
Last Name	Enter the family name (last name) of the contact person.
Address Line 1	Enter the first line of the company address.
Address Line 2	Enter the second line of the address, if applicable.
Supplier ID	Enter the Supplier ID of the company that is shipping the freight.
City	Enter the city of the company office.
State	Enter the state or province of the company office.
Zip	Enter the postal code of the company office.
Country	Enter the country or region of the company office. **Note:** You can only generate a carrier label for shipments that are being delivered within the United States.

The following table describes the fields and actions in the Line Items panel on the Create Shipment page:

Action	Description
Add More Orders	Add orders to the shipment.
Remove Lines	Delete the selected order line items from the shipment.

Action	Description
Notes	Opens a Sterling as a Service Applications pop-up window, which displays the notes that were added at the line level of the corresponding PO. You can also click the icon for an Order Line to view these notes. In the Notes panel, the icon indicates notes that were added by the Sponsor at the line level of the PO. The icon indicates notes that were added by the Partner at the line level of the PO.

Field	Description
#	Enter the sequence number of the shipment line.
Order #	Shows the order number. Click the **Order #** hyperlink to open the Order Detail page, which displays information about the order.
Order Date	Shows the date the order was placed.
Line Identifier	Shows the line item identifier.
Item	Shows the name of the item. If you have configured an item rule to make your Item ID the same as your customer's Item ID, hover help is displayed when you place your mouse over the icon for this field. The hover help displays the item attributes if your Sponsor configured the template to display these attributes. Examples of these attributes are Color, Size, Product, General Description, Item ID, and Item Description.
Expected Ship Date	Shows the expected ship date.
Ordered Qty.	Shows the ordered quantity.
Shipped Qty.	Shows the quantity of the items that have shipped.
Qty. in Shipment	Enter the quantity of the items to be included in the shipment.
UOM	Shows the unit of measurement for the item.

Action	Description
≫	Click ≫ to view additional fields in the Line Items panel:
	Customer Item
	Shows the name of the item as known to the customer.
	If you have configured an item rule so that your Item ID is different from your customer's Item ID, hover help is displayed when you place your mouse over the icon for this field. The hover help displays the item attributes if your Sponsor configured the template to display these attributes and the Customer ID.
	Examples of these attributes are Color, Size, Product, General Description, Item ID, and Item Description.
	UPC Code
	Shows the Universal Product Code of the item.
	GTIN
	Shows the Global Trade Item Number of the item.
	Product Class
	Shows the product class of the item.
	Release #
	Shows the release number for the shipment.
	Contract #
	Shows the contract number for the shipment.
	Customer #
	Shows the customer number for the shipment.

Add an Order to a Shipment

You can use Sterling Supplier Portal to add more orders to a shipment.

About this task

The Ship PO task is only available as a Related Task on the Order Detail page if the choreography of the community includes the ASN.

Procedure

To add an order to a shipment, follow these steps:

1. From the menu bar, click **My Documents** > **Orders**. The Search Criteria - Find Order panel is displayed on the Find Order page.
2. Enter the search criteria and click **Search**. The Search List panel displays the list of orders.
3. Select the order you want to ship and click **View Details**. You can also click the **Order Number** hyperlink. The Order Detail page is displayed.
4. Click **Ship PO**. The Create Shipment page is displayed.
5. In the Line Items panel, click **Add More Orders**.

6. When the Search Criteria - Find Order page opens, enter the search criteria and click **Search**. The Search List panel is displayed with a list of orders.

   If the shipment that corresponds to an order requires route planning, the Search List panel only displays the orders that require route planning.

7. Click ✔ for the order you want to add to the shipment. The selected order is added to the shipment.

Chapter 23. Delete a Draft Shipment (Partner Task)

About this task

You can delete a shipment that has been saved as a draft.

To perform this task, follow these steps.

Procedure

1. In the Home screen, click **Saved as Draft** in the **Overview** panel.
2. The Drafts screen is displayed. In the **Drafts** panel, click the link pertaining to the shipment you want to delete.
3. The Create Shipment screen is displayed. Click **Delete** to delete the draft form of the shipment.

   Note:
   - When you delete a draft form of a shipment that was sent for route planning, an update is sent to your Sponsor that route planning is no longer required if you have not received the route plan yet.
   - When you delete a draft form of the shipment for which you have received the route plan, an update is sent to your Sponsor to delete the corresponding order from the load.
   - If you receive a route plan for a shipment that has been deleted, the document is rejected.

Chapter 24. Ship From Locations

Configure Ship From Locations (Partner Task)

Sterling Supplier Portal enables you to configure the Ship From Locations. You can maintain a list of ship from locations. While creating a shipment, based on the community configuration by your Sponsor, a list of ship from locations are available. When you modify the ship from location details, the Sponsor is notified of the change. Sponsors can view the ship from location details of their Partners. Sponsors can also create their version of ship from location list.

About this task

While creating a community, the Sponsor can set the ship from location option for their Partners to any of the following rules:

- You can ship the orders from any location. This will be the default option.
- You can ship the orders only from the locations approved by your Sponsor. The approved list of ship from locations is available as a drop-down list in the **From Address** panel in the Create Shipment screen. If the approved list is not available, you cannot send the Advance Shipment Notice (ASN).
- You can ship the orders only from locations uploaded by your Sponsors. You can view the list of ship from locations that are uploaded by your Sponsors. The approved list of ship from locations is available as a drop-down list in the **From Address** panel in the Create Shipment screen. You can also request your Sponsor to add a new ship from location if required.

You can add, modify, and delete the ship from locations that you have configured.

Add Ship From Location (Partner Task)

Sterling Supplier Portal enables you to add the Ship From Locations.

About this task

To add the ship from location details, perform the following steps:

Procedure

1. In the Sterling Supplier Portal Console, navigate to **Setup > Configure Ship From Locations**.
2. The Configure Ship From Locations screen is displayed.
3. Click **Add**. The Add Ship From Location pop-up window is displayed. Enter the appropriate values in the fields and click **Save**.

   Note: While modifying a community, if a Sponsor makes any fields of the Ship From Location screen mandatory, then the Partner should ensure that the mandatory fields of the Ship From Location screen are added for all the pre-configured ship from locations also.

   The following table describes the fields that make up the Add Ship From Location pop-up.

Field	Description
Location ID *	Enter the location ID of the location from where the order is shipped. You can add all the alphanumeric characters, special characters, and symbols except the % symbol.
Company	Enter the name of the company from which the order is shipped.
Supplier ID	Enter the identifier of the company from which the order is shipped.
First Name	Enter the first name of the contact person.
Last Name	Enter the last name of the contact person.
Address Line 1 *	Enter the first line of the company address.
Address Line 2	Enter the second line of address, if applicable.
City *	Enter the city in which the contact is located.
State	Enter the state in which the contact is located.
Zip Code *	Enter the zip code of the city in which the contact is located.
Country *	Enter the name of the country in which the contact is located.
Phone #	Enter the phone number of the contact person.
Email	Enter the email ID of the contact person.

* = Mandatory field

Note: You cannot create multiple ship from locations with the same information in the fields such as address line 1, address line 2, city, state, country, and zip code.

When a Partner is not a member of the community at the time when the Sponsor uploads the ship from location data, this information is retained by the system for 30 days and is processed when the Partner joins the community.

Modify Ship From Location (Partner Task)

About this task

Sterling Supplier Portal enables a Partner organization to modify its Ship From Locations.

To modify the ship from locations, perform the following steps.

Procedure

1. In the Sterling Supplier Portal Console, navigate to **Setup > Configure Ship From Locations**.
2. The Configure Ship From Locations screen is displayed. From the list of ship from locations, select the check box against the Location ID that you want to modify and click **Modify**.
3. The Modify Ship From Location screen is displayed. Modify the required values in the **Location Info** panel and click **Save**.

   The following table describes the fields that make up the Modify Ship From Location screen:

Field	Description
Location ID	Enter the location ID of the location from where the order is shipped. You can add all the alphanumeric characters, special characters, and symbols except the % symbol.
Company	Enter the name of the company from which the order is shipped.
Supplier ID	Enter the identifier of the company from which the order is shipped.
First Name	Enter the first name of the contact person.
Last Name	Enter the last name of the contact person.
Address Line 1	Enter the first line of the company address.
Address Line 2	Enter the second line of address, if applicable.
City	Enter the city in which the contact is located.
State	Enter the state in which the contact is located.
Zip Code	Enter the zip code of the city in which the contact is located.
Country	Enter the name of the country in which the contact is located.
Phone #	Enter the phone number of the contact person.
Email	Enter the e-mail ID of the contact person.
Customer	Indicates the name of the customer.
Customer's Configuration	Indicates the Sponsor's version of the ship from location details.

Delete Ship From Location (Partner Task)

About this task

Sterling Supplier Portal enables you to delete a ship from location that you have added.

To delete the ship from location details, perform the following steps.

Procedure

1. In the Sterling Supplier Portal Console, navigate to **Setup > Configure Ship From Locations**.
2. The Configure Ship From Locations screen is displayed. From the list of ship from locations, select the check box against the Location ID that you want to delete and click **Delete**.

   To delete all the ship from locations at the same time, select the check box against the Location ID field name and click **Delete**.

   Note: When you delete a ship from location, the corresponding Sponsor version also gets deleted.

Chapter 25. View Payment Terms

View Payment Terms for New Orders or Change Orders

About this task

To view the payment terms for a new order or change order, perform the following tasks.

Procedure

1. In the Home Page, click **New Communications** in the **Overview** Panel.
2. In the New Communications screen:
   - To view the payment terms for a new order, select the check box against the **New PO** message whose payment terms you want to view and click **View Details**. Alternatively, you can click the **Subject** hyperlink of the corresponding purchase order. The Order Detail screen is displayed.
   - To view the payment terms for a change order, select the check box against the **Change PO** message whose payment terms you want to view and click **View Details**. Alternatively, you can click the **Subject** hyperlink of the corresponding purchase order. The Change Order Detail screen is displayed.
3. Click the **View Payment Terms** action to view the Payment Terms screen.

View Payment Terms for an Existing Order

About this task

To view the payment terms for an existing order, perform the following tasks.

Procedure

1. From the menu bar, navigate to **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed in the Find Order screen. Enter the search criteria and click **Search**.
3. The **Search List** panel is displayed with the list of orders. From this list, select the check box against the orders whose payment terms you want to view and click **View Details**. Alternatively, you can click the **Order Number** hyperlink. The Order Detail screen is displayed.
4. In the Order Detail screen, click the **View Payment Terms** action to view the Payment Terms screen.

View Payment Terms When Acknowledging an Order

About this task

To view the payment terms while acknowledging an order, perform the following tasks.

Procedure

1. From the menu bar, navigate to **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed in the Find Order screen. Enter the search criteria and click **Search**.

3. The **Search List** panel is displayed with the list of orders. From this list, select the check box against the order you want to acknowledge and click **View Details**. Alternatively, you can click the **Order Number** hyperlink.

4. The Order Detail screen is displayed, click **Ack PO**. The Create Acknowledgement screen is displayed.

5. In the Create Acknowledgement screen, click the **View Payment Terms** action to view the Payment Terms screen.

View Payment Terms When Invoicing a Shipment

About this task

To view the payment terms while invoicing a shipment, perform the following tasks.

Procedure

1. From the menu bar, navigate to **My Documents** > **Shipments**.

2. The **Search Criteria - Find Shipment** panel is displayed in the Find Shipment screen. Enter the search criteria and click **Search**.

3. The **Search List** panel is displayed with the list of shipments. From this list, select the check box against the shipment whose payment terms you want to view and click **View Details**. Alternatively, you can click the **Shipment Number** hyperlink. The Shipment Detail screen is displayed.

4. In the Shipment Detail screen, click **Create Invoice**. The Create Invoice screen is displayed.

5. In the Create Invoice screen, click the **View Payment Terms** action to view the Payment Terms screen.

   Note:
   - If there are multiple orders in the invoice, payment terms for the order with maximum pay by date will be displayed.
   - If a Sponsor sends the description for the payment term in the PO, then the pay by date field in the Create Invoice screen does not get populated based on payment term.

View Payment Terms When Invoicing an Order

About this task

To view the payment terms when invoicing an order, perform the following tasks.

Procedure

1. From the menu bar, navigate to **My Documents** > **Orders**.

2. The **Search Criteria - Find Order** panel is displayed in the Find Order screen. Enter the search criteria and click **Search**.

3. The **Search List** panel is displayed with the list of orders. From this list, select the check box against the order whose payment details you want to view and click **View Details**. Alternatively, you can click the **Order Number** hyperlink. The Order Detail screen is displayed.

4. In the Order Detail screen, click **Invoice PO**.The Create Invoice screen is displayed.

5. In the Create Invoice screen, click the **View Payment Terms** action to view the Payment Terms screen.

   Note: If a Sponsor sends the description for the payment term in the PO, then the pay by date field in the Create Invoice screen does not get populated based on payment term.

View Payment Terms for Sent Invoice

About this task

To view the payment terms for a sent invoice, perform the following tasks.

Procedure

1. From the menu bar, navigate to **My Documents** > **Invoices**.
2. The **Search Criteria - Find Invoice** panel is displayed in the Find Invoice screen. Enter the search criteria and click **Search**.
3. The **Search List** panel is displayed with the list of invoices. From this list, select the check box against the invoice whose payment terms you want to view and click **View Details**. Alternatively, you can click the **Invoice Number** hyperlink. The Invoice Detail screen is displayed.
4. In the Invoice Detail screen, click the **View Payment Terms** action to view the Payment Terms screen.

Payment Terms Screen

The Payment Terms screen displays the following:

- Payment Term - Indicates the terms type for each payment term sent by the Sponsor in the PO.

  Note: If a Sponsor sends the description for the payment terms in the PO, then the Payment Term type is always displayed as **Basic** and the description passed is displayed in the Payment Terms screen.

- Payment Due Information: Indicates one or both of the following details:
  – The date by which the payment is due.
  – The number of days after invoice date or ship date or delivery date by which the payment is due.
- Term Discount Information: Indicates one of the following details:
  – The date by which the Sponsor should make the payment in order to receive the discount
  – The number of days after invoice date or ship date or delivery date by which the Sponsor should make the payment in order to receive the discount.
  – The discount percentage and discount amount.

  Note:
- The Sponsor should send a consolidated list of payment terms while sending Change PO.
- The Payments Terms screen displays discount percentage and the discount amount as received in the PO without computing it.

Chapter 26. View the Payment Details for an Order (Partner Task)

You can use Sterling Supplier Portal to view the Payment Detail page for an order.

About this task

Each payment is made based on one invoice. If there are multiple orders for the invoice, only the first order displays the Payment status.

Procedure

To view the Payment Detail page, follow these steps:

1. From the menu bar, click **My Documents** > **Orders**. The Search Criteria - Find Order panel is displayed on the Find Order page.
2. Enter the search criteria and click **Search**. The results of the search are displayed in the Search List panel.
3. Select an order and click **View Details**. You can also click the corresponding **Order Number** hyperlink. The Order Detail page is displayed.
4. Click **View Payments**. The Payment Detail page is displayed.

   The Order Header panel on the Payment Detail page contains the following entries:

Field	Description
Order #	Shows the order number. Click the **Order Number** hyperlink to open the Order Detail page.
Req. Ship Date	Shows the requested ship date.
Status	Shows the order status.
Order Date	Shows the order date.
Req. Delv. Date	Shows the requested delivery date.
Terms	Shows the terms of an order.
Customer	Shows the customer's name. Click the **Customer Name** hyperlink to open the Customer Detail page.
Community	Shows the community name. Click the **Community Name** hyperlink to open the Community Detail page.
Order Amount	Shows the total cost of the order.

The Payment List panel on the Payment Detail page contains the following entries:

Field	Description
Currency	Shows the currency of the order.
Payment Date	Shows the payment date.

Field	Description
Amount	Shows the amount.
Type	Shows the payment type.
Payment Reference #	Shows the reference number that was assigned to the payment: • If the payment method used by the Sponsor is Check, the Check Number is displayed. • If the payment method used by the Sponsor is Credit Card, the Credit Card Number is displayed. • If the payment method used by the Sponsor is SWIFT, the Bank Identifier Code (BIC) is displayed. • If the payment method used by the Sponsor is CHIPS, the 3-digit or 4-digit international interbank transaction number is displayed.
Invoice #	Shows the invoice number.

What to do next

As an alternative, perform the following steps to view the payment for an order:

1. In the Overview panel of the Dashboard, click the **New Communications** hyperlink. The New Communications page is displayed.
2. Select the check box for the payment you want to view. You can also click the corresponding **Subject** hyperlink. The Payment Detail page is displayed.
3. When you are done viewing payment details, you can click **View New Communications** in the Order Header panel of the Payment Detail page. The New Communications page opens, where you can see all the new communications that were received in the system.

Chapter 27. View Charges and Allowances (Partner Task)

You can view the details of charges and allowances from the Order Detail page, Create Invoice page, Invoice Detail page, and Create Acknowledgement page.

Procedure

To view the charges and allowances from the Order Detail page, perform the following tasks.

1. From the menu bar, navigate to **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed in the Find Order page. Enter the search criteria and click **Search**.
3. The **Search List** panel is displayed with the list of orders. From this list, select the check box against the orders whose details you want to view and click **View Details**. Alternatively, you can click the **Order Number** hyperlink. The Order Detail page is displayed.
4. In the Order Detail page:
   - Click the header charge amount to view the charge detail in the Charges pop-up window, which provides the lists of header charges associated with the order.
   - Click the line charge amount to view the charge detail in the Charges pop-up window, which provides the lists of line charges associated with each order line.

What to do next

To view the charges and allowances from the Create Invoice page, perform the following tasks:

1. From the menu bar, navigate to **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed in the Find Order page. Enter the search criteria and click **Search**.
3. The **Search List** panel is displayed with the list of orders. From this list, select the check box against the order whose details you want to view and click **View Details**. Alternatively, you can click the **Order Number** hyperlink. The Order Detail page is displayed.
4. In the Order Detail page, click **Invoice PO**. The Create Invoice page is displayed.
5. Alternatively, from the menu bar, navigate to **My Documents** > **Shipments**.
6. The **Search Criteria - Find Shipment** panel is displayed in the Find Shipment page. Enter the search criteria and click **Search**.
7. The **Search List** panel is displayed with the list of shipments. From this list, select the check box against the shipment whose details you want to view and click **View Details**. Alternatively, you can click the **Shipment Number** hyperlink. The Shipment Detail page is displayed.
8. In the Shipment Detail page, click **Create Invoice**. The Create Invoice page is displayed.
9. In the Create Invoice page:

- Click the header charge amount to view the charge detail in the Charges pop-up window, which provides the lists of header charges associated with the order.
- Click the line charge amount to view the charge detail in the Charges pop-up window, which provides the lists of line charges associated with each order line.

    Note: The charge and allowance displayed in the Charges pop-up window are recomputed based on the quantity mentioned in the invoice.

To view the charges and allowances from the Invoice Detail page, perform the following tasks:

1. From the menu bar, navigate to **My Documents** > **Invoices**.
2. The **Search Criteria - Find Invoice** panel is displayed in the Find Invoice page. Enter the search criteria and click **Search**.
3. The **Search List** panel is displayed with the list of invoices. From this list, select the check box against the invoice whose details you want to view and click **View Details**. Alternatively, you can click the **Invoice Number** hyperlink. The Invoice Detail page is displayed.
4. In the Invoice Detail page:
   - Click the header charge amount to view the charge detail in the Charges pop-up window, which provides the lists of header charges associated with the order.
   - Click the line charge amount to view the charge detail in the Charges pop-up window, which provides the lists of line charges associated with each order line.

To view the charges and allowances from the Create Acknowledgement page, perform the following tasks:

1. From the menu bar, navigate to **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed in the Find Order page. Enter the search criteria and click **Search**.
3. The **Search List** panel is displayed with the list of orders. From this list, select the check box against the orders whose details you want to view and click **View Details**. Alternatively, you can click the **Order Number** hyperlink.
4. The Order Detail page is displayed. Click **Ack PO**. The Create Acknowledgement page is displayed.
5. In the Create Acknowledgement page:
   - Click the header charge amount to view the charge detail in the Charges pop-up window, which provides the lists of header charges associated with the order.
   - Click the line charge amount to view the charge detail in the Charges pop-up window, which provides the lists of line charges associated with each order line.

     The following table describes the fields that make up the Charges page.

Field	Description
Name	Indicates the name of the charge or discount.
Type	Indicates whether the charge is an allowance (associated amount that gets deducted from the order amount) or a charge (associated amount that gets added to the order amount).

Field	Description
Amount	Indicates the charge amount in the currency specified in the order.
%	Indicates the percentage of unit price provided to the Buyer for a charge or discount.

Chapter 28. View the Details of a Shipment (Partner Task)

You can use Sterling Supplier Portal to search for and view the details of shipments that were created by your Sponsors.

About this task

If you have resent this shipment, only the latest shipment details are displayed.

If you have canceled the shipment, the latest shipment details with a shipped quantity of zero are displayed.

In the case of a replaced shipment, the latest shipment details are displayed on the Shipment Detail page. You cannot view the original shipment.

If you are an EDI-capable Partner and are registered in a Chargeback Only community, you can only view the Shipment details. You cannot perform any of the related shipment tasks.

Procedure

To view the details of a shipment that is associated with a particular order, follow these steps:

1. From the menu bar, click **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed on the Find Order page. Enter the **Order #** you want to search for. You can also select one of the following options:
   - **is**: The application searches for the exact order number.
   - **starts with**: The application searches for order numbers that start with the specified value.
3. Enter the search criteria and click **Search**.
4. The results of the search are displayed in the **Search List** panel. Select the check box against the appropriate order and click **View Details**.
5. The Order Detail page is displayed. Click **View Shipments**. The Shipment Detail page is displayed, containing the details of the shipment associated with the order you specified.

   Note: In the Related Task, Viewing the ASN option is available only if it has been included as a part of the choreography.

What to do next

To view the shipments directly, follow these steps:

1. From the menu bar, navigate to **My Documents** > **Shipments**.
2. The **Search Criteria - Find Shipment** panel is displayed on the Find Shipment page. Enter the search criteria and click **Search**.

   The following table describes the fields and actions that make up the **Search Criteria - Find Shipment** panel on the Find Shipment page.

Action	Description

Favorite Searches	Click this to search for a saved search in order to execute it.
Save Search	Click this to save the current search criteria that you have entered as a favorite search.
Delete Current Search	This icon is enabled when you are viewing the current saved search. Click this to delete the current saved search criteria.
Field	**Description**
Shipment #	Enter the shipment number to be included in the search.
Transportation Method	From the drop-down list, select the mode of transportation.
Order #	Enter the **Order #** you want to search for. You can also select one of the following options: • **is**: The application searches for the exact order number. • **starts with**: The application searches for order numbers that start with the specified value.
Community	Enter the community name that is to be included in the search. You can also click 🔍 to search for a specific Community.
Item ID	Enter the identifier of the item that is to be included in the search.
Item Description	Enter the description of the item that is to be included in the search.
BOL #	Enter the bill of lading number that is to be included in the search.
SCAC	Enter the carrier type that is to be included in the search. You can also click 🔍 to search for a specific carrier.
Shipment Date	Enter the date and time range, on which the shipment that is to be included in the search was created. You can also click 📅 to select the date range. You can also click 🕐 to select the time range.
Status	From the drop-down list, select the status of the document. For example, select **Created** to search for shipments that are saved as a draft.
Sort Result by	From the drop-down list, select the attribute by which the search result should be sorted when displayed in the **Search List** panel. If you select a value here, the search result in the **Search List** panel will be sorted in ascending order. To sort the result in descending order, select the **Sort in Descending Order** check box. If you do not select a value here, the search result in the **Search List** panel will not be sorted.
User-Defined Fields	Enter the user-defined fields (UDF) for the shipments you are searching for. You can also select one of the following options: • **is**: The application searches for the exact field. • **starts with**: The application searches for user-defined fields that start with the specified value. If the Partner is on-boarded to more than one community, you must select a value in the **Community** field to select the user-defined fields on the Search Criteria page.
Sort in Descending Order	Select this check box to sort the search result in the **Search List** panel in descending order.

Max Records	Shows the maximum number of shipments that will be displayed in the **Search List** panel. You can enter the maximum number of shipments to be displayed as search results.

3. The results of the search are displayed in the **Search List** panel of the Search Criteria page. From the list of shipments, select the shipment whose details you want to view and click **View Details**.

   Alternatively, you can also click the corresponding **Shipment Number** hyperlink. The Shipment Detail page is displayed.

   The following table describes the fields and the action that make up the **Search List** panel on the Search Criteria page.

Action	Description
View Detail	Click this to view the Shipment Detail page that displays the shipment details.
Field	**Description**
Shipment #	Shows the shipment number. Click the **Shipment Number** hyperlink to view the Shipment Detail page, which displays the shipment details.
BOL #	Shows the bill of lading number of the shipment.
Order #	Shows the order number. Click the **Order Number** hyperlink to view the Order Detail page, which displays the order details. **Note:** The **Order Number** hyperlink is disabled for draft shipments.
Customer	Shows the name of the customer. Click the **Customer** hyperlink to view the details of the customer.
Community	Shows the name of the community to which the Partner belongs.
SCAC	Shows the name of the shipment carrier service.
Shipment Date	Shows the date on which the shipment was shipped.
Status	Shows the current status of the shipment.
≫	Click ≫ to view the user-defined fields added for a Shipment. The user-defined fields are displayed only if your Sponsor has configured them to be displayed on the List page.

The following table describes the action that make up the Shipment Detail page.

Action	Description
Generate Packing Slip	Click this to generate and print a Packing Slip.
Reprint Carrier Label	Click this to reprint a Carrier Label. **Note:** This button is displayed only when a Carrier Label has been generated at least once.

The following table describes the fields that make up the **Shipping Information** panel on the Shipment Detail page.

Field	Description
Shipment #	Shows the shipment number.
Customer	Click this to view the customer details.
Community	Click this link to view the details of the community.
Shipment On	Shows the date and time on which the shipment is scheduled to be shipped.
Weight	Shows the weight of the shipment.
Order Delivery Date	Shows the date on which the shipment is expected to be delivered.
Volume	Shows the total volume of the shipment.
Perishable Allowed	Shows if perishable items are allowed in the shipment.
Hazmat Allowed	Shows if hazardous items are allowed in the shipment.
Drop Ship Shipment	Shows whether the shipment is a drop ship shipment or not.
Packing Status	Shows the status of packing. • **Not Packed**: Shows that the shipment was not packed before sending it to the Sponsor. • **Partially Packed**: Shows that the shipment was partially packed before sending it to the Sponsor. • **Fully Packed**: Shows that the shipment was fully packed before sending it to the Sponsor.
User-Defined Fields	Shows the user-defined fields added for a shipment at the Shipment header level. The user-defined fields are displayed only if your Sponsor has configured them to be displayed in the **Shipment Information** panel.

The following table describes the fields that make up the **Transportation Details** panel on the Shipment Detail page.

Field	Description
# of Cartons	Shows the total number of cartons included in the shipment.
# of Pallets	Shows the total number of pallets included in the shipment.
SCAC	Shows the carrier service used for shipping.
Carrier Service Code	Shows the carrier service code used for shipping.
BOL #	Shows the bill of lading number of the shipment.
Pro #	Shows the progressive number of the shipment.
Transportation Method	Shows the mode of transportation.
Routing	Shows the mode of routing.
Freight Terms	Shows whether the shipment comes under Prepaid or Collect.
User-Defined Fields	Shows the user-defined fields added for a shipment at the Shipment header level. The user-defined fields are displayed only if your Sponsor has configured them to be displayed in the **Transportation Details** panel.
Equipment Type	The Equipment type details provided while sending ASN will be displayed.
Routing Attribute	The Routing Attribute details provided while sending ASN will be displayed.

The following table describes the fields that make up the **Additional Information** panel on the Shipment Detail page.

Field	Description
User-Defined Fields	Shows the user-defined fields carried over from the Acknowledgement and Order pages. The user-defined fields are displayed only if your Sponsor has configured them to be displayed in the Shipment Details panel.
Additional Information	Click this hyperlink to view more user-defined fields.

The following table describes the fields that make up the **Containers** panel on the Create Shipment page. If you have generated a tracking number and carrier label for this shipment, the **Container** panel is displayed.

Field	Description
Container Seq. #	Shows the sequence number of the container.
Container #	Shows the container number.
Container Type	Shows the container type.
Seal #	Shows the seal number of the container.
Height	Shows the height of the container.
Length	Shows the length of the container.
Width	Shows the width of the container.
Weight	Shows the gross weight of the container.
Size UOM	From the drop-down list, select the unit of measure.
Tracking #	Shows the tracking number of the container.
UOM	Shows the unit of measure.
Ship To	Shows the name, address, and identifier of the of the company to whom the order needs to be shipped. **Note:** The Buyer ID attribute is the Data Universal Numbering System (DUNS) number for the Sponsor that has been passed in the order XML. If the Buyer ID is not passed in the order, the Sponsor's DUNS number as entered in Sterling B2B Collaboration Network is displayed in the order.
Ship From	Shows the name, address, and identifier of the of the company from which the order is shipped. **Note:** The Supplier ID attribute is the Data Universal Numbering System (DUNS) number for the Partner organization. The value for Supplier ID is passed during the shipment and Invoice creation by the Partner.

The following table describes the fields that make up the **Line Items** panel of the Shipment Detail page.

Field	Description
#	Shows the sequence number of the line.
Order #	Shows the order number. Click the **Order Number** hyperlink to view the Order Detail page that displays the order details.

Field	Description
Order Date	Shows the date on which the order was placed.
Line Identifier	Shows the identifier of the line.
Item	Shows the identifier of the item. If you have configured an item rule such that your Item ID is same as your customer's Item ID, the hover help containing item attributes is displayed when you place your mouse over the icon adjacent to this field. This hover help is displayed only if your Sponsor has configured these attributes to display on Supplier Portal when configuring the corresponding template. Sterling B2B Collaboration Network supports attributes Color, Size, Product, Sub Product, and General Description for the item in addition to the Item ID and Item Description.
Order Ship Date / Shipping window	Shows the order ship date. In case the shipment contains only shipping window orders then the literal will be shown as **shipping window**. If the shipment contains even one order which is not a shipping window orders then the literal will be shown as **order ship date**.
Customer Item	Shows the customer's item. If you have configured an item rule such that your Item ID is different from your customer's Item ID, item attributes are displayed in a hover help when you place your mouse over the icon adjacent to this field. This hover help is displayed only if your Sponsor has configured these attributes and Customer ID to display on Supplier Portal when configuring the corresponding template. If your Sponsor has not selected this configuration, the hover help is not displayed. Sterling B2B Collaboration Network supports attributes Color, Size, Product, Sub Product, and General Description for the item in addition to the Item ID and Item Description.
Ordered Qty.	Shows the ordered quantity.
Shipped Qty.	Shows the shipped quantity. **Note:** The value in this field is zero, if the corresponding shipment has been cancelled.
Qty. In Shipment	Shows the quantity of the items that have been shipped.
UOM	Shows the Unit of Measure.
≫	Click ≫ to view the additional fields in the panel. Following are the fields that are displayed: • **UPC Code** - Shows the Universal Product Code. • **GTIN** - Shows the Global Trade Item Number. • **Product Class** - Shows the product class of the item. • **Release #** - Shows the release number of the shipment. • **Contract #** - Shows the contract number of the shipment. • **User-Defined Fields** - Shows the user-defined fields added for a Shipment at the Shipment Line level. The user-defined fields are displayed only if your Sponsor has configured them to be displayed on the Shipment Detail page.

Chapter 29. Resend a Shipment (Partner Task)

You can replace a shipment that has already been sent. When replacing the shipment, you can modify all the fields except the shipment number.

About this task

You can replace a shipment if the following conditions are fulfilled:
- Your Sponsor has configured the community so that you are allowed to resend the shipment.
- The shipment has not been invoiced completely or partially.

Procedure

To resend shipments that are associated with an order, follow these steps.
1. From the menu bar, navigate to **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed on the Find Order screen. Enter the search criteria and click **Search**.
3. The results of the search are displayed in the **Search List** panel. Select the check box for the appropriate order and click **View Details**. Alternately, click the **Order Number** hyperlink to view the order details.
4. The Order Detail screen is displayed. Click **View Shipments**.

   Note: In the Related Task, the **View Shipments** option is available only if your Sponsor has included it as a part of the choreography for the community.
5. The Shipment Detail screen is displayed, containing the details of the shipment associated with the order you specified. Click the **Resend ASN** related task.
6. The Resend Shipment screen is displayed. Enter the appropriate values in the fields, and click **Resend ASN**.

What to do next

To resend a shipment directly, follow these steps:
1. From the menu bar, navigate to **My Documents** > **Shipments**.
2. The **Search Criteria - Find Shipment** panel is displayed on the Find Shipment screen. Enter the search criteria and click **Search**.
3. The results of the search are displayed in the **Search List** panel on the Search Criteria screen. From the list of shipments displayed, select the shipment that you want to resend and click **View Details**. Alternatively, you can also click the corresponding **Shipment Number** hyperlink.
4. The Shipment Detail screen is displayed. Click the **Resend ASN** related task.
5. The Resend Shipment screen is displayed. Enter the appropriate values in the fields, and click **Resend ASN**.

Notes:
- The **Shipment #** field in the **Shipping Information** panel of the Resend Shipment screen is a read-only field. You cannot edit the value in the field.
- You cannot resend a shipment that has been canceled.

- You cannot resend a shipment if the corresponding order has been invoiced completely or partially.
- You cannot send a shipment for route planning when resending the shipment if it corresponds to an order that requires route planning.
- If you have sent the earlier shipment for route planning, the **Weight**, **Volume**, and **SCAC** fields are disabled on the Resend Shipment screen. The **Generate Carrier Label**, **Regenerate Carrier Label**, and **Reprint Carrier Label** buttons are also not displayed on the Resend Shipment screen.
- If you want to reduce the shipped quantity for a shipment that has been packed and sent, you must reduce the packed quantity before you reduce the shipped quantity. To reduce the packed quantity, click **Remove Containers** in the **Containers** panel of the Resend Shipment screen. Sterling Supplier Portal will reset the packed quantity to zero. You can then reduce the shipped quantity and click **Pack Shipment** in the **Containers** panel of the Resend Shipment screen.
- If your sponsor did not make packing a mandatory task when it set up the community, you will not be able to perform packing or generate container labels.
- Your sponsor can modify the community to which you belong. If the sponsor changes the profile for the ship from location, you might not be able to resend a shipment that you created before the sponsor updated the community. Instead, you have to cancel the shipment and then send a new shipment.

Chapter 30. Cancel a Shipment (Partner Task)

About this task

You can cancel a shipment if it has not been invoiced, and send it again with a new shipment number. A shipment can be cancelled only if this shipment belongs to the community for which your Sponsor has allowed you to cancel a shipment.

To cancel shipments associated with an order, follow these steps.

Procedure

1. From the menu bar, navigate to **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed in the Find Order screen. Enter the search criteria and click **Search**.
3. The results of the search are displayed in the **Search List** panel. Select the check box against the appropriate order and click **View Details**. Alternately, click the **Order Number** hyperlink to view the order details.
4. The Order Detail screen is displayed. Click **View Shipments**.

   Note: In the Related Task, the **View Shipments** option is available only if your Sponsor has included it as a part of the choreography for the community.
5. The Shipment Detail screen is displayed, containing the details of the shipment associated with the order you specified. Click the **Cancel ASN** related task.
6. A message asking for confirmation is displayed. Click **OK** to cancel the shipment.

What to do next

To cancel the shipments directly:

1. From the menu bar, navigate to **My Documents** > **Shipments**.
2. The **Search Criteria - Find Shipment** panel is displayed in the Find Shipment screen. Enter the search criteria and click **Search**.
3. The results of the search are displayed in the **Search List** panel in the Search Criteria screen. From the list of shipments displayed, select the shipment that you want to cancel and click **View Details**. Alternatively, you can also click the corresponding **Shipment Number** hyperlink.
4. The Shipment Detail screen is displayed. Click **Cancel ASN** related task.
5. A message asking for confirmation is displayed. Click **OK** to cancel the shipment.

Note:
- You cannot resend a cancelled shipment. Instead, you will need to create a new shipment.
- You cannot cancel a shipment if the corresponding order has been invoiced completely or partially.
- When a shipment is cancelled, the status of the shipment is Cancelled and the status of the order goes back to the earlier status based on the choreography selected for the community, by your Sponsor.
- When a shipment that was sent for route planning is cancelled, a request is sent to your Sponsor to remove the shipment from the load planned for it.

- When a shipment that has already been packed and shipped is cancelled, the containers are also deleted from the shipment.

Chapter 31. Invoices

Send an Invoice for an Order (Partner Task)

You can send an invoice for an order to your sponsor. This feature is available if your Sponsor selected Invoices in the choreography for your community.

About this task

This topic describes the default layout of the Create Invoice and Invoice Detail pages:
- The Sponsor might have created the invoice layout to hide, disable, or change the order of some of the fields.
- The Sponsor selects which fields are required.

The following rules apply to sending an invoice for an order:
- The **Invoice PO** task is only available as a Related Task if the choreography of the community includes Invoices.
- The **Invoice PO** task is not available until the order has been shipped (either partially or completely).

Tip: If you know the Sponsor's Purchase Order number, you can send the invoice for the order directly from the Overview panel of the Dashboard.

Procedure

To send the invoice for an order to a Sponsor, follow these steps:
1. From the menu bar, click **My Documents** > **Orders**. The Find Order page opens.
2. In the Search Criteria - Find Order panel, enter the **Order #** you want to search for. You can also select one of the following options:
   - **is**: The application searches for the exact order number.
   - **starts with**: The application searches for order numbers that start with the specified value.
3. Enter the search criteria and click **Search**. The Search List panel is displayed with the list of orders.
4. Select the order and click **View Details**. You can also click the **Order Number** hyperlink. The Order Detail page is displayed.
5. Click **Invoice PO**. The Create Invoice page is displayed and shows the order lines that have been shipped.
6. Enter the appropriate values in the fields and click **Send Invoice** to send the invoice to the Sponsor.

   The following table describes the fields in the Invoice Header panel on the Create Invoice page:

Action	Description
View Payment Terms	Opens the Payment Terms page, which displays the payment terms for the order.

Action	Description
Notes	Opens a Sterling as a Service Applications pop-up window, which displays the notes that were added at the header level of the corresponding PO. In the Notes panel, the icon indicates notes that were added by the Sponsor at the header level of the PO. The icon indicates notes that were added by the Partner at the header level of the PO. The Sponsor can configure the application to copy the notes from the PO to the invoice. Notes that the Sponsor and Partner added to the PO are displayed in the Notes panel.

Field	Description
Invoice #	Enter the invoice number. This field is required. Click the icon to open the Sterling as a Service Applications pop-up window, which displays the notes that were added at the header level of the corresponding PO.
Invoice Date	Enter the date of the invoice. You can also click to select the date.
Order #	Shows the order number. Click the **Order Number** hyperlink to view the Order Detail page, which displays the details for the selected order.
Order Date	Shows the date the order was created.
Invoice Type	Select the type of invoice.
Pay by Date	Enter the date by which the Sponsor has to make the payment. You can also click to select the date. If payment terms for the order exist, Sterling Supplier Portal automatically calculates and displays the Pay By Date.
Tax Exempt	Shows whether the order is exempt from taxes.
Buyer Tax ID	Shows the Tax identifier of the Sponsor (Buyer). By default, the Buyer Tax ID is submitted in the order. You can modify this value if your Sponsor configured the Buyer Tax ID as an editable value for the community.
Supplier Tax ID	Shows the Tax identifier of the Partner (Supplier). When you send an invoice for the first time, you must enter the Supplier Tax ID. By default, subsequent invoices use the Supplier Tax ID from the first invoice.
Release #	Shows the release number of the order.
Community	Shows the community that is associated with the Purchase Order. Click the **Community** hyperlink to view the business rules that the Sponsor defined for the community.
Customer	Shows the name of the customer. Click the **Customer** hyperlink to view information about this organization.

Action	Description
Header Charge	Shows the total amount of the invoice, in the currency that was specified in the order. Click the value of the header charge to open the Charges page, which displays the charge name and value. If the order status is *Partially Invoiced*, the header-level charges are not included in the invoice that is created for the order.

The following table describes the fields in the Remit To panel on the Invoice Detail page:

Field	Description
Company	Enter the name of the company that will be paid for the invoice.
Supplier ID	Enter the Supplier ID of the company that will be paid for the invoice.
First Name	Enter the given name (first name) of the contact person.
Last Name	Enter the family name (last name) of the contact person.
Address Line 1	Enter the first line of the company address.
Address Line 2	Enter the second address line, if applicable.
City	Enter the city of the company office.
State	Enter the state or province of the company office.
Zip	Enter the postal code of the company office.
Country	Enter the country or region of the company office.

The following table describes the fields in the Bill To panel on the Invoice Detail page:

Field	Description
Company	Enter the name of the Sponsor company that will be billed for the invoice.
Buyer ID	Enter the Buyer ID of the company that will be billed for the invoice.
First Name	Enter the given name (first name) of the contact person.
Last Name	Enter the family name (last name) of the contact person.
Address Line 1	Enter the first line of the company address.
Address Line 2	Enter the second address line, if applicable.
City	Enter the city of the company office.
State	Enter the state or province of the company office.
Zip	Enter the postal code of the company office.
Country	Enter the country or region of the company office.

The following table describes the fields and actions in the Line Items panel on the Invoice Detail page:

Action	Description
Remove Lines	Select the order line that you want to delete and click **Remove Lines**.

Action	Description
Notes	Opens a Sterling as a Service Applications pop-up window, which displays the notes that were added at the line level of the corresponding PO. You can also click the icon for an Order Line to view these notes. In the Notes panel, the icon indicates notes that were added by the Sponsor at the line level of the PO. The icon indicates notes that were added by the Partner at the line level of the PO. The Sponsor can configure the application to copy the notes from the PO to the invoice. Notes that the Sponsor and Partner added to the PO are displayed in the Notes panel.

Field	Description
Line Identifier	Shows the line item identifier.
Item	Shows the name of the item. If you have configured an item rule to make your Item ID the same as your customer's Item ID, hover help is displayed when you place your mouse over the icon for this field. The hover help displays the item attributes if your Sponsor has configured the template to display these attributes. Examples of these attributes are Color, Size, Product, Sub Product, General Description, Item ID, and Item Description.
Ordered Qty.	Shows the ordered quantity of the item.
Shipped Qty.	Shows the quantity of the items that have shipped.
Invoiced Qty.	Shows the quantity of the items that were billed in an invoice.
Qty. in Invoice	Enter the total quantity of the items that will be included in an invoice.
UOM	Shows the unit of measurement for the quantity.
Unit Price	Shows the unit price of the item, in the currency that was specified in the order. If you changed the unit price of the item when you acknowledged the order, the acknowledged price is displayed.
Tax Name	Select the tax you want to apply to this line item. When you add a tax to an invoice line, the tax name is required. You can only edit the tax name from the Line Items panel if a single tax is assigned to this line. To add multiple taxes, click the **Add/Copy Taxes** hyperlink to open the Sterling as a Service Applications pop-up window. You can define additional tax entries.

Action	Description
Tax Jurisdiction	Enter the tax jurisdiction. You can also use this field to display the Tax Law Reference.
	On the Line Items panel, you can select a new value if there is a single tax for this line.
	If you enter more than 30 characters, the **Tax Jurisdiction** field in the Line items panel will not display the entire entry. You can click the **Tax Jurisdiction** field and use the arrow keys on your keyboard to scroll through all the characters in the entry. You can also click the **Add/Copy Taxes** hyperlink to view the tax jurisdiction.
Tax %	Enter the percentage of the tax.
	When you add a tax to an invoice line, the percentage is required.
	You can only edit the tax percentage from the Line Items panel if a single tax is assigned to this line.
	If multiple taxes are assigned to this line, click the **Add/Copy Taxes** hyperlink to open the Sterling as a Service Applications pop-up window. You can delete the existing tax and add it again with a new tax percentage.
Line Charges	Shows the charge for the order line, in the currency that was specified in the order. Click the value of the line charge to open the Charges page, which displays the charge name and its value.
	If the order line status is *Partially Invoiced*, the line-level charges are not included for the invoice that is created for the order.
Line Total	Shows the total amount of the order line, in the currency that was specified in the order.
	If you entered a different price when you acknowledged the order, the line total is calculated as the sum of (invoiced quantity x acknowledged price) + tax amount for this line.
»	Click » to view the additional fields in the Line Items panel:
	Customer Item
	Shows the name of the item as known to the customer.
	If you have configured an item rule so that your Item ID is different from your customer's Item ID, hover help is displayed when you place your mouse over the icon for this field. The hover help displays the item attributes if your Sponsor has configured the template to display these attributes and the Customer ID.
	Examples of these attributes are Color, Size, Product, Sub Product, General Description, Item ID, and Item Description.
	UPC Code
	Shows the Universal Product Code of the item.
	GTIN
	Shows the Global Trade Item Number of the item.
	Product Class
	Shows the product class of the item.

The following table describes the fields and actions in the Taxes panel on the Invoice Detail page:

Action	Description
Add/Copy Row	Adds a new row: • To add rows, enter the number of rows in the **Add/Copy** field and click . • To copy a row, select the line that you want to copy and click . • To copy multiple records, select the lines that you want to copy, enter the number of rows in the **Add/Copy** field, and click .

Field	Description
Tax Name	Select the name of the tax.
Tax %	Enter the tax percentage.
Category	Select the tax category. If the Category is not displayed, then it is no longer supported for this community.
Tax Jurisdiction	Enter the tax jurisdiction. You can also use this field to display the Tax Law Reference.
Amount	Enter the total tax amount, in the currency that was specified in the order.

The following table describes the fields and actions in the Charges and Allowances panel on the Invoice Detail page:

Action	Description
Add/Copy Row	Adds a new row: • To add rows, enter the number of rows in the **Add/Copy** field and click . • To copy a row, select the line that you want to copy and click . • To copy multiple records, select the lines that you want to copy, enter the quantity in the **Add/Copy** field, and click .

Field	Description
Charge Name	Select the charge. The charge description is displayed in parentheses.
Reason Code	Enter the reason code for the charge.
Category	Select the charge category.
Amount	Enter the total amount of the charges, in the currency that was specified in the order.

The following table describes the fields and the action in the Invoice Totals panel on the Invoice Detail page:

Action	Description
Calculate Total	Click **Calculate Total** to recalculate the total amount if any changes were made to the **Total Tax** or **Terms Discount** fields.

Field	Description
Item Invoice Total	Shows the item invoice total.
Total Supplier Charges	Shows the total amount that your organization is charging to the Sponsor.

Action	Description
Total Charges	Shows the total charges.
Total Tax	Shows the total tax amount.
Terms Discount	Shows the terms of the discount.
Total Amount	Shows the total amount of the order. If you entered a different price when you acknowledged the order, the total amount is calculated as the sum of (invoiced quantity x acknowledged price) for all the lines.

Adding Multiple Taxes to an Invoice Line

You can assign multiple taxes to an invoice line. This feature is available if your Sponsor selected Invoices in the choreography for your community.

About this task

This topic describes the default layout of the Create Invoice page:
- The Sponsor might have created the invoice layout to hide, disable, or change the order of some of the fields.
- The Sponsor selects which fields are required.

The following rules apply to adding multiple taxes to an invoice line:
- The **Invoice PO** task is only available as a Related Task if the choreography of the community includes Invoices.
- The **Invoice PO** task is not available until the order has been shipped (either partially or completely). This rule applies when the choreography of the community includes Shipments.
- The Create Invoice page only displays the order lines that have been shipped. This rule applies when the choreography of the community includes Shipments.

Procedure

To add multiple taxes to an invoice line, follow these steps:
1. From the menu bar, click **My Documents** > **Orders**. The Search Criteria - Find Order panel is displayed on the Find Order page.
2. Enter the search criteria and click **Search**. The Search List panel is displayed with the list of orders.
3. Select the order and click **View Details**. You can also click the corresponding **Order Number** hyperlink.
4. On the Order Detail page, click **Invoice PO**. The Create Invoice page is displayed.
5. Click the **Add/Copy Taxes** hyperlink for the invoice line where you want to add additional taxes. The Sterling as a Service Applications pop-up window is displayed.

   The following table describes the fields and the action in the Taxes panel in the Sterling as a Service Applications pop-up window.

Action	Description

	Click this icon to delete the corresponding tax. You have the following options:
🗑	• Click **OK** to delete this tax from all invoice lines that contain this tax.
	• Click **Cancel** to only delete this tax from the corresponding invoice line.
	Note: You cannot cancel this pop-up window without deleting a tax. To exit this pop-up window, you must click **OK**, **Cancel**, or the Close (X) icon in the upper right corner of the pop-up window. However, if you click the Close icon, the tax is still deleted from the corresponding invoice line.

Field	Description
Tax Name	Shows the type of tax.
Tax Jurisdiction	Shows the tax jurisdiction. You can also use this field to display the Tax Law Reference.
Tax %	Shows the percentage of the tax.
Amount	Shows the total amount of tax on the item, in the currency specified in the order.

The following table describes the fields and the action in the Enter Tax panel in the Sterling as a Service Applications pop-up window.

Action	Description
Add	Click **Add** to define the tax for the line items. When you are done defining the tax, you have the following options:
	OK
	Applies the tax to all invoice lines in the invoice.
	If you add a new tax and other invoice lines have a tax with the same name, Sterling Supplier Portal replaces the tax jurisdiction and tax percentage in the other invoice lines with the values from the new tax.
	Cancel
	Only applies this tax to the corresponding invoice line. **Note:** You cannot cancel this pop-up window without adding a tax. To exit this pop-up window, you must click **OK**, **Cancel**, or the Close (X) icon in the upper right corner of the pop-up window. However, if you click the Close icon, the tax is still added to the corresponding invoice line.
	After you add a tax, you cannot modify the values. You must delete the tax and add it again with the new values.
Tax Name	Select the tax you want to apply to this line item. The tax name is required.
	You cannot add the same tax more than once to an invoice line. After you select a tax, the name no longer appears in the **Tax Name** list.

Action	Description
Tax Jurisdiction	Enter the tax jurisdiction. You can also use this field to display the Tax Law Reference.
	If you enter more than 30 characters, the **Tax Jurisdiction** field will not display the entire entry. You can click the **Tax Jurisdiction** field and use the arrow keys on your keyboard to scroll through all the characters in the entry. You can also click the **Add/Copy Taxes** hyperlink to view the tax jurisdiction.
Tax %	Enter the percentage of the tax. The percentage is required.

Send an Invoice for a Shipment (Partner Task)

You can send an invoice for a shipment to your sponsor. This feature is available if your Sponsor selected Invoices in the choreography for your community.

About this task

This topic describes the default layout of the Create Invoice page:
* The Sponsor might have created the invoice layout to hide, disable, or change the order of some of the fields.
* The Sponsor selects which fields are required.

Tip: If you know the Sponsor's Purchase Order number, you can submit an invoice for a shipment directly from the Overview panel of the Dashboard.

Procedure

To send an invoice for a shipment, follow these steps:
1. From the menu bar, click **My Documents** > **Shipments**. The Find Shipment page opens.
2. In the Search Criteria - Find Shipment panel, enter the search criteria and click **Search**. The Search List panel is displayed with the list of shipments.
3. Select the shipment and click **View Details**. You can also click the **Shipment Number** hyperlink. The Shipment Detail page is displayed.
4. Click **Create Invoice**. The page that opens depends on whether the shipment contains more than one eligible order for the invoice:

   Single Order

   If the shipment contains only one eligible order for an invoice, the Create Invoice page opens.

   Multiple Orders

   If the business rule **Invoice should contain lines only from single order** is selected, the Select an Order to be Invoiced page opens. This page lists the orders for which you can submit an invoice.

   For each order, the Select an Order to be Invoiced page displays the following information:

   Order #

   Shows the Customer PO number.

   Order Ship Date or Shipping Window

Shows the expected ship date of the order.

If the shipment only contains shipping window orders, the field is called **Shipping Window**.

If the shipment contains at least one order that is not a shipping window order, the field is called **Order Ship Date**.

Status

Shows the Order Status.

Select one of the orders in the list to open the Create Invoice page. The Create Invoice page displays the lines from the order you selected.

5. Define the invoice settings on the Create Invoice page.

   The following table describes the fields in the Invoice Header panel on the Create Invoice page:

Action	Description
View Payment Terms	Opens the Payment Terms page, which displays the payment terms for the orders in the shipment.
Notes	Opens a Sterling as a Service Applications pop-up window, which displays the notes that were added at the header level of the corresponding PO. In the Notes panel, the ![icon] icon indicates notes that were added by the Sponsor at the header level of the PO. The ![icon] icon indicates notes that were added by the Partner at the header level of the PO. The Sponsor can configure the application to copy the notes from the PO to the invoice. Notes that the Sponsor and Partner added to the PO are displayed in the Notes panel.

Field	Description
Invoice #	Enter the invoice number. This field is required. Click the ![icon] icon to open the Sterling as a Service Applications pop-up window, which displays the notes that were added at the header level of the corresponding PO.
Invoice Date	Enter the date of the invoice. You can also click ![icon] to select the date.
Invoice Type	Select the type of invoice.
Pay by Date	Enter the date by which the Sponsor has to make the payment. You can also click ![icon] to select the date. If payment terms for the order exist, Sterling Supplier Portal automatically calculates and displays the Pay by Date.
Tax Exempt	Shows whether the order is exempt from taxes.
Buyer Tax ID	Shows the Tax identifier of the Sponsor (Buyer). By default, the Buyer Tax ID is submitted in the order. You can modify this value if your Sponsor configured the Buyer Tax ID as an editable value for the community.

Supplier Tax ID	Shows the Tax identifier of the Partner (Supplier). When you send an invoice for the first time, you must enter the Supplier Tax ID.
	By default, subsequent invoices use the Supplier Tax ID from the first invoice.
Release #	Shows the release number of the order.
Community	Shows the community that is associated with the Purchase Order.
	Click the **Community** hyperlink to view the business rules that the Sponsor defined for the community.
Customer	Shows the name of the customer. Click the **Customer** hyperlink to view information about this organization.
Header Charge	Shows the total amount of the invoice, in the currency that was specified in the order.
	Click the value of the header charge to open the Charges page, which displays the charge name and value.

The following table describes the fields and the action in the Shipment Information panel on the Create Invoice page:

Action	Description
Shipment Address	Click **Shipment Address** to view the address details for the **Ship To** and **Ship From** locations.
Field	**Description**
Shipment #	Shows the shipment number. Click the **Shipment Number** hyperlink to open the Shipment Detail page, which displays details about the shipment.
Shipment On	Shows the date the shipment is scheduled to depart after the pickup.
Pro #	Shows the Progressive (PRO) number of the shipment.
Transportation Method	Shows the transportation mode, such as Truckload or Rail.
SCAC	Enter the Standard Carrier Alpha Code (SCAC), which is a unique code used to identify transportation companies.
Carrier Service Code	Shows the carrier service code.
Routing	Shows the mode of routing.

The following table describes the fields and the action in the Remit To panel on the Create Invoice page:

Field	Description
Company	Enter the name of the company that will be paid for the invoice.
Supplier ID	Enter the Supplier ID of the company that will be paid for the invoice.
First Name	Enter the given name (first name) of the contact person.
Last Name	Enter the family name (last name) of the contact person.
Address Line 1	Enter the first line of the company address.
Address Line 2	Enter the second address line, if applicable.
City	Enter the city of the company office.
State	Enter the state or province of the company office.

Field	Description
Zip	Enter the postal code of the company office.
Country	Enter the country or region of the company office.

The following table describes the fields and the action in the Bill To panel on the Create Invoice page:

Field	Description
Company	Enter the name of the Sponsor company that will be billed for the invoice.
Buyer ID	Enter the Buyer ID of the company that will be billed for the invoice.
First Name	Enter the given name (first name) of the contact person.
Last Name	Enter the family name (last name) of the contact person.
Address Line 1	Enter the first line of the company address.
Address Line 2	Enter the second address line, if applicable.
City	Enter the city of the company office.
State	Enter the state or province of the company office.
Zip	Enter the postal code of the company office.
Country	Enter the country or region of the company office.

The following table describes the fields and the action in the Line Items panel on the Create Invoice page:

Action	Description
Remove Lines	Select the order line that you want to delete and click **Remove Lines**.
Notes	Opens a Sterling as a Service Applications pop-up window, which displays the notes that were added at the line level of the corresponding PO.
	You can also click the icon for an Order Line to view these notes.
	In the Notes panel, the icon indicates notes that were added by the Sponsor at the line level of the PO.
	The icon indicates notes that were added by the Partner at the line level of the PO.
	The Sponsor can configure the application to copy the notes from the PO to the invoice. Notes that the Sponsor and Partner added to the PO are displayed in the Notes panel.
Field	**Description**
Line Identifier	Shows the line item identifier.
Order #	Shows the order number. Click the **Order Number** hyperlink to open the Order Detail page, which displays information about the order.

Item	Shows the name of the item.
	If you have configured an item rule to make your Item ID the same as your customer's Item ID, hover help is displayed when you place your mouse over the icon for this field. The hover help displays the item attributes if your Sponsor has configured the template to display these attributes.
	Examples of these attributes are Color, Size, Product, Sub Product, General Description, Item ID, and Item Description.
Ordered Qty.	Shows the ordered quantity of the item.
Shipped Qty.	Shows the quantity of the items that have shipped.
Invoiced Qty.	Shows the quantity of the items that were billed in an invoice.
Qty. in Invoice	Enter the total quantity of the items that will be included in an invoice.
UOM	Shows the unit of measurement for the quantity.
Tax Name	Select the tax you want to apply to this line item.
	When you add a tax to an invoice line, the tax name is required.
	You can only edit the tax name from the Line Items panel if a single tax is assigned to this line.
	If multiple taxes have been applied to this line, click the **Add/Copy Taxes** hyperlink to open the Sterling as a Service Applications pop-up window. You can delete the corresponding tax and add it again with a new name.
Tax Jurisdiction	Enter the tax jurisdiction. You can also use this field to display the Tax Law Reference.
	On the Line Items panel, you can select a new value if there is a single tax for this line.
	If multiple taxes have been applied to this line, click the **Add/Copy Taxes** hyperlink to open the Sterling as a Service Applications pop-up window. You can delete the corresponding tax and add it again with a new tax jurisdiction.
	If you enter more than 30 characters, the **Tax Jurisdiction** field in the Line items panel will not display the entire entry. You can click the **Tax Jurisdiction** field and use the arrow keys on your keyboard to scroll through all the characters in the entry. You can also click the **Add/Copy Taxes** hyperlink to view the tax jurisdiction.
Tax %	Enter the percentage of the tax.
	When you add a tax to an invoice line, the percentage is required.
	You can only edit the tax percentage from the Line Items panel if a single tax is assigned to this line.
	If multiple taxes are assigned to this line, click the **Add/Copy Taxes** hyperlink to open the Sterling as a Service Applications pop-up window. You can delete the existing tax and add it again with a new tax percentage.
Line Charges	Shows the charge for the order line, in the currency that was specified in the order. Click the value of the line charge to open the Charges page, which displays the charge name and its value.

Unit Price	Shows the unit price of the item, in the currency specified in the order.
	If you entered a different price when you acknowledged the order, the acknowledged price is displayed as the unit price.
≫	Click ≫ to view the additional fields in the Line Items panel:
	Line Total
	Shows the total amount of the order line, in the currency that was specified in the order.
	If you entered a different price when you acknowledged the order, the line total is calculated as the sum of (invoiced quantity x acknowledged price) + tax amount for this line.
	Customer Item
	Shows the name of the item as known to the customer.
	If you have configured an item rule so that your Item ID is different from your customer's Item ID, hover help is displayed when you place your mouse over the icon for this field. The hover help displays the item attributes if your Sponsor has configured the template to display these attributes and the Customer ID.
	Examples of these attributes are Color, Size, Product, Sub Product, General Description, Item ID, and Item Description.
	UPC Code
	Shows the Universal Product Code of the item.
	GTIN
	Shows the Global Trade Item Number of the item.
	Product Class
	Shows the product class of the item.

The following table describes the fields and the action in the Taxes panel on the Create Invoice page:

Action	Description
Add/Copy Row	Adds a new row:
	• To add rows, enter the number of rows in the **Add/Copy** field and click ➕ .
	• To copy a row, select the line that you want to copy and click ➕ .
	• To copy multiple records, select the lines that you want to copy, enter the number of rows in the **Add/Copy** field, and click ➕ .
Field	**Description**
Tax Name	Select the name of the tax.
Tax %	Enter the tax percentage.
Category	Select the tax category.
	If the Category is not displayed, then it is no longer supported for this community.

Action	Description
Tax Jurisdiction	Enter the tax jurisdiction. You can also use this field to display the Tax Law Reference.
Amount	Enter the total tax amount, in the currency that was specified in the order.

The following table describes the fields and the action in the Charges and Allowances panel on the Create Invoice page:

Action	Description
Add/Copy Row	Adds a new row: • To add rows, enter the number of rows in the **Add/Copy** field and click . • To copy a row, select the line that you want to copy and click . • To copy multiple records, select the lines that you want to copy, enter the quantity in the **Add/Copy** field, and click .
Field	**Description**
Charge Name	Select the charge. The charge description is displayed in parentheses.
Reason Code	Enter the reason code for the charge.
Category	Select the charge category.
Amount	Enter the total amount of the charges, in the currency that was specified in the order.

The following table describes the fields and the action in the Invoice Totals panel on the Create Invoice page:

Action	Description
Calculate Total	Click **Calculate Total** to recalculate the total amount if any changes were made to the **Total Tax** or **Terms Discount** fields.
Field	**Description**
Item Invoice Total	Shows the item invoice total.
Total Supplier Charges	Shows the total amount that your organization is charging to the Sponsor.
Total Charges	Shows the total charges.
Total Tax	Shows the total tax amount.
Terms Discount	Shows the terms of the discount.
Order Amount	Shows the total amount of the order. If you entered a different price when you acknowledged the order, the total amount is calculated as the sum of (invoiced quantity x acknowledged price) for all the lines.

6. When you are done defining the invoice settings, click **Send Invoice** to submit the shipment invoice to the Sponsor

What to do next

If you try to submit an invoice for a shipment that contains multiple orders, you might receive the following error:

```
Community is configured to accept single order invoice
```

If you receive this error, use the following workflow:

1. Delete all the orders except one from the shipment.

2. Submit an invoice for that order.

3. Create a separate invoice for each order, until you have submitted an invoice for all the orders.

Adding Multiple Taxes to an Invoice Line in a Shipment Invoice

You can assign multiple taxes to an invoice line in a shipment invoice. This feature is available if your Sponsor selected Invoices in the choreography for your community.

About this task

This topic describes the default layout of the Create Invoice page:

- The Sponsor might have created the invoice layout to hide, disable, or change the order of some of the fields.

- The Sponsor selects which fields are required.

The **Invoice PO** task is only available as a Related Task if the choreography of the community includes Invoices.

Procedure

To add multiple taxes to an invoice line, follow these steps:

1. From the menu bar, click **My Documents** > **Shipments**. The Search Criteria - Find Shipment panel is displayed on the Find Shipment page.

2. Enter the search criteria and click **Search**. The Search List panel is displayed with the list of shipments.

3. Select the shipment and click **View Details**. You can also click the corresponding **Shipment Number** hyperlink.

4. On the Shipment Detail page, click **Create Invoice**. The Create Invoice page is displayed.

5. Click the **Add/Copy Taxes** hyperlink for the invoice line where you want to add additional taxes. The Sterling as a Service Applications pop-up window is displayed.

   The following table describes the fields and the action in the Taxes panel in the Sterling as a Service Applications pop-up window.

Action	Description
🗑	Click this icon to delete the corresponding tax. You have the following options: • Click **OK** to delete this tax from all invoice lines that contain this tax. • Click **Cancel** to only delete this tax from the corresponding invoice line. **Note:** You cannot cancel this pop-up window without deleting a tax. To exit this pop-up window, you must click **OK**, **Cancel**, or the Close (X) icon in the upper right corner of the pop-up window. However, if you click the Close icon, the tax is still deleted from the corresponding invoice line.

Field	Description
Tax Name	Shows the type of tax.
Tax Jurisdiction	Shows the tax jurisdiction. You can also use this field to display the Tax Law Reference.
Tax %	Shows the percentage of the tax.
Amount	Shows the total amount of tax on the item, in the currency specified in the order.

The following table describes the fields and the action in the Enter Tax panel in the Sterling as a Service Applications pop-up window.

Action	Description

Add	Click **Add** to define the tax for the line items. When you are done defining the tax, you have the following options:
	
	OK
	
	    Applies the tax to all invoice lines in the invoice.
	
	    If you add a new tax and other invoice lines have a tax with the same name, Sterling Supplier Portal replaces the tax jurisdiction and tax percentage in the other invoice lines with the values from the new tax.
	
	Cancel
	
	    Only applies this tax to the corresponding invoice line.
	Note: You cannot cancel this pop-up window without adding a tax. To exit this pop-up window, you must click **OK**, **Cancel**, or the Close (X) icon in the upper right corner of the pop-up window. However, if you click the Close icon, the tax is still added to the corresponding invoice line.
	
	After you add a tax, you cannot modify the values. You must delete the tax and add it again with the new values.

Tax Name	Select the tax you want to apply to this line item. The tax name is required. You cannot add the same tax more than once to an invoice line. After you select a tax, the name no longer appears in the **Tax Name** list.
Tax Jurisdiction	Enter the tax jurisdiction. You can also use this field to display the Tax Law Reference. If you enter more than 30 characters, the **Tax Jurisdiction** field will not display the entire entry. You can click the **Tax Jurisdiction** field and use the arrow keys on your keyboard to scroll through all the characters in the entry. You can also click the **Add/Copy Taxes** hyperlink to view the tax jurisdiction.
Tax %	Enter the percentage of the tax. The percentage is required.

View the Details of an Invoice (Partner Task)

You can search for invoices and view the invoice details. You can only select **Invoice** as a Related Task if your Sponsor selected the Invoice in the choreography for your community.

About this task

If you are an EDI-capable Partner and are registered to a Chargeback Only community, you can only view the Invoice details. You cannot perform any of the related invoicing tasks.

Procedure

To view the details of an invoice that is associated with an order, follow these steps:

1. From the menu bar, click **My Documents** > **Orders**.
2. The Search Criteria - Find Order panel is displayed on the Find Order page. Enter the **order #** you want to search for. You can also select one of the following options:
   - **is**: The application searches for the exact order number.
   - **starts with**: The application searches for order numbers that start with the specified value.
3. Enter the search criteria and click **Search**.
4. The results of the search are displayed in the Search List panel. Select an order and click **View Details**.
5. The Order Detail page is displayed. Click **View Invoices**. The Invoice Detail page is displayed, along with details of the invoice associated with the order that you specified.

What to do next

To view the details of an invoice associated with a particular shipment:

1. From the menu bar, click **My Documents** > **Shipments**.
2. The Search Criteria - Find Shipment panel is displayed on the Find Shipment page. Enter the search criteria and click Search.
3. The Search List panel is displayed with the list of shipments. Select the check box against the shipment for which you want to view the invoice, and click **View Details**. Alternatively, you can click the corresponding **Shipment Number** hyperlink.
4. The Shipment Detail page is displayed. Click **View Invoices**. The Invoice Detail page is displayed.

You can also view the invoices directly:

1. From the menu bar, navigate to **My Documents** > **Invoices**.
2. The Search Criteria - Find Invoice panel is displayed on the Find Invoice page. Enter the search criteria and click **Search**.
3. The results of the search are displayed in the Search List panel. From the list of invoices displayed, select the invoice whose details you want to view and click **View Details**. Alternatively, you can also click the **Invoice Number** hyperlink. The Invoice Detail page is displayed.

   The following table describes the fields and actions that make up the Search Criteria - Find Invoice panel on the Find Invoice page.

Action	Description
Favorite Searches	Click this to search for a saved search that is to be executed.
Save Search	Click this to save the current search as a favorite search.

Action	Description
Delete Current Search	This icon is enabled when you are viewing the current saved search. Click this to delete the current saved search criteria.
Field	**Description**
Invoice #	Enter the invoice number to be included in the search.
Order #	Enter the order number you want to search for. You can also select one of the following options: • **is**: The application searches for the exact order number. • **starts with**: The application searches for order numbers that start with the specified value.
Invoice Date	Enter the invoice date range to be included in the search. You can also click 🗓 to select the date range.
Payment Due Date	Enter the payment due date range to be included in the search. You can also click 🗓 to select the date range.
Community	Enter the community to be included in the search. You can also click 🔍 to search the specific community.
Shipment #	Enter the shipment number to be included in the search.
User-Defined Fields	Enter the user-defined fields (UDF) you want to search for. You can also select one of the following options: • **is**: The application searches for the exact user-defined field value. • **starts with**: The application searches for the user-defined fields that start with the specified value. If the Partner belongs to more than one community, you must select a **Community** to view the user-defined fields on the Search Criteria page.
Sort Result by	From the drop-down list, select the attribute by which the search result should be sorted when displayed in the Search List panel. If you select a value here, the search result in the Search List panel will be sorted in ascending order. To sort the result in descending order, select the **Sort in Descending Order** check box. If you do not select a value here, the search result in the Search List panel will not be sorted.
Sort in Descending Order	Select this check box to sort the search result in the Search List panel in descending order.
Max Records	Shows the maximum number of invoices that will be displayed in the Search List panel. You can enter the maximum number of invoices to be displayed as search results.

The following table describes the fields that make up the Search List panel.

Action	Description
View Details	Click this to view the Invoice Detail page.
Field	**Description**

Action	Description
Invoice #	Shows the invoice number. Click the **Invoice Number** hyperlink to view the Invoice Detail page, which displays the invoice details.
Order #	Shows the order number. Click the **Order Number** hyperlink to view the Order Detail page, which displays the order details.
Shipment #	Shows the shipment number. Click the **Shipment Number** hyperlink to view the Shipment Detail page, which displays the shipment details.
Customer	Shows the customer name. Click the **Customer** hyperlink to view the Customer Information page, which displays the customer details.
Community	Shows the community name.
Amount	Shows the total amount in the currency specified in the order.
Invoice Date	Shows the date on which the invoice was generated.
Payment Due Date	Shows the date on which the payment is due to the Supplier.
⯮	Click ⯮ to view the user-defined fields added for an Invoice. The user-defined fields are displayed only if your Sponsor has configured them to be displayed on the Invoice List page.

The following table describes the fields that make up the Invoice Header panel on the Invoice Detail page.

Action	Description
View Payment Terms	Click this to view the Payment Terms page that displays the payment terms for the orders in the invoice.
Field	**Description**
Invoice #	Shows the invoice number.
Invoice Date	Shows the date and time on which the invoice was generated.
Order #	Shows the order number. Click the **Order Number** hyperlink to view the Order Detail page, which displays the order details.
Order Date	Shows the date on which the order was placed.
Invoice Type	Shows the type of invoice.
Pay By Date	Shows the date on which the payment to the Supplier is due.
Tax Exempt	Shows whether this is exempt from tax or not.
Buyer Tax ID	Shows the Tax identifier of the Sponsor (Buyer). The value for Buyer Tax ID is passed in the order.
Supplier Tax ID	Shows the Tax identifier of the Partner (Supplier). The value for Supplier Tax ID is passed by the Partner when sending the Invoice.
Release #	Shows the release number.

Action	Description
Community	Shows the community name. Click the **Community Name** hyperlink to view the Community Detail page, which displays the community details.
Customer	Shows the customer name. Click the **Customer Name** hyperlink to view the Customer Detail page, which displays the customer details.
Header Charge	Shows the total amount for the invoice in the currency specified in the order. Click the value of the header charge to view the Charges page, which displays the charge name and its value. If the order status is partially invoiced, then the header level charges are not included for the invoice being created for that order.
Remit To	Shows the name, address, and identifier of the of the company to which the shipment bill is remitted.
Bill To	Shows the name, address, and identifier of the company to whom the shipment bill is sent.
User-Defined Fields	Shows the user-defined fields added for an Invoice at the Invoice header level. The user-defined fields are displayed only if your Sponsor has configured them to be displayed on the Invoice Detail page.

The following table describes the fields that make up the Additional Information panel on the Invoice Detail page.

Field	Description
User-Defined Fields	Shows the user-defined fields that are carried over from the Shipment, Acknowledgement, and Order pages. The user-defined fields are displayed only if your Sponsor has configured them to be displayed on the Invoice Detail page.
Additional Information	Click this hyperlink to view more user-defined fields.

The following table describes the fields that make up the Line Items panel on the Invoice Detail page.

Field	Description
Line Identifier	Shows the line identifier of the item.
Item	Shows the name of the item. If you have configured an item rule such that your Item ID is same as your customer's Item ID, the hover help containing item attributes is displayed when you place your mouse over the icon adjacent to this field. This hover help is displayed only if your Sponsor has configured these attributes to display on Supplier Portal when configuring the corresponding template. Sterling Supplier Portal supports attributes Color, Size, Product, Sub Product, and General Description for the item in addition to the Item ID and Item Description.
Ordered Qty.	Shows the ordered quantity.
Shipped Qty.	Shows the shipped quantity.

Field	Description
Invoiced Qty.	Shows the invoiced quantity.
Qty. in Invoice	Shows the quantity included in the invoice.
UOM	Shows the unit of measure.
Unit Price	Shows the unit price of each item in the currency specified in the order. If you have changed the unit price of the item when acknowledging the order, the acknowledged price is displayed in the **Unit Price** field.
Line Charges	Shows the amount for the order line in the currency specified in the order. Click the value of the line charge to view the Charges page, which displays the charge name and its value. **Note:** If the order line status is partially invoiced, then the line level absolute charges are not included for the invoice being created for that order line.
Tax Amount	Shows the amount of the line-level tax levied in the currency specified in the order. Click the value of the tax amount to view the Sterling as a Service Applications pop-up window, which displays the various tax names, tax percentages, and tax amounts applied to this invoice line.
Line Total	Shows the total amount of the items in the currency specified in the order. If you have entered a different price when acknowledging the order, the line total is calculated as the sum of (invoiced quantity * acknowledged price) for this line.
Customer Item	Shows the item required by the customer. If you have configured an item rule such that your Item ID is different from your customer's Item ID, item attributes are displayed in a hover help when you hover the mouse over the icon adjacent to this field. This hover help is displayed only if your Sponsor has configured these attributes and Customer ID to display on Supplier Portal when configuring the corresponding template. If your Sponsor has not selected this configuration, the hover help is not displayed. Sterling Supplier Portal supports attributes Color, Size, Product, Sub Product, and General Description for the item in addition to the Item ID and Item Description.
≫	Click ≫ to view the additional fields in the panel. The following fields are displayed: • **UPC Code** - Shows the Universal Product Code. • **GTIN** - Shows the Global Trade Item Number. • **Product Class** - Shows the product class of the item. • **User-Defined Fields** - Shows the user-defined fields added for an Invoice at the Invoice Line level. The user-defined fields are displayed only if your Sponsor has configured them to be displayed on the Invoice List page.

The following table describes the fields that make up the Taxes panel on the Invoice Detail page.

Field	Description
Tax Name	Shows the type of tax.
Tax %	Shows the percentage of the tax.

Field	Description
Category	Shows the category type. This field is no longer supported and might not be displayed in this panel.
Tax Jurisdiction	Shows the tax jurisdiction. You can also use this field to display the Tax Law Reference.
Amount	Shows the total amount of tax on the list in the currency specified in the order.

The following table describes the fields that make up the Charges and Allowances panel on the Invoice Detail page.

Field	Description
Charge Name	Shows the charge name and its description. The description is displayed along with the charge name in parentheses "()".
Reason Code	Shows the reason code.
Category	Shows the category.
Amount	Shows the amount in the currency specified in the order.

The following table describes the fields that make up the Invoice Totals panel on the Invoice Detail page.

Field	Description
Item Invoice Total	Shows the total amount of the invoice items.
Total Supplier Charges	Shows the total amount charged by the Supplier.
Total Charges	Shows the total charges.
Total Tax	Shows the total tax amount.
Terms Discount	Shows the terms of discount.
Total Amount	Shows the total amount of invoice, including the charges. **Note:** If you have entered a different price when acknowledging the order, the order amount is calculated as the sum of (invoiced quantity * acknowledged price) for all the lines.

Chapter 32. Printing Forms and Labels

Generate and Print a Packing Slip (Partner Task)

About this task

Sterling Supplier Portal enables you to generate and print a Packing Slip that will accompany the shipments when delivered directly to the consumer or to the retail outlet. You can re-print a Packing Slip for a shipment as many times as needed.

You can generate and print a Packing Slip from the Create Shipment and Shipment Detail screens.

To generate and print a Packing Slip from the Create Shipment screen, follow these steps.

Procedure

1. From the menu bar, navigate to **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed in the Find Order screen. Enter the search criteria and click **Search**.
3. The results of the search are displayed in the **Search List** panel. From the list of orders displayed, select the order whose details you want to view and click **View Details**. Alternatively, you can click the corresponding **Order Number** hyperlink.
4. The Order Detail screen is displayed. Click **Ship PO**.

   Note: The **Ship PO** is available as a Related Task only if Advance Shipment Notification (ASN) is a part of the choreography of the community to which the Partners belongs.

5. The Create Shipment screen is displayed. Enter the required information and then click **Generate Packing Slip** to generate and print a Packing Slip.

   If you click **Generate Packing Slip** without saving the shipment, "Please save the shipment as draft before generating Packing Slip" message is displayed. After saving shipment as draft the Packing Slip is displayed in PDF format.

6. The Packing Slip is displayed as a PDF, which you can print using any Windows printer.

What to do next

To generate and print a Packing Slip from the Shipment Detail screen:

1. From the menu bar, navigate to **My Documents** > **Shipments**.
2. The **Search Criteria - Find Shipment** panel is displayed in the Find Shipment screen. Enter the search criteria and click **Search**.
3. The results of the search are displayed in the **Search List** panel. From the list of shipments displayed, select the shipment whose details you want to view and click **View Details**. Alternatively, you can click the corresponding **Shipment Number** hyperlink.
4. The Shipment Detail screen is displayed. Enter the required information and then click **Generate Packing Slip** to generate and print a Packing Slip.

5. The Packing Slip is displayed as a PDF, which you can print using any Windows printer.

The following table describes the fields that make up the Packing Slip.

Field	Description
Header Message	Indicates the header information provided by the Sponsor. For example, information such as the Sponsor's fax number and e-mail address is displayed here.
Bill To	Indicates the name and address of the organization or person to whom the bill is sent.
Ship To	Indicates the name and address of the organization or person to whom the order is shipped.
Order #	Indicates the Sales Order number.
Shipment #	Indicates the shipment number.
Customer Order #	Indicates the customer Purchase Order sent to you by the Sponsor.
Carrier Service Code	Indicates the carrier service code.
Carrier Account #	Indicates the mode of routing.
Item ID	Indicates the identifier of each item in the shipment as specified by the customer.
Item Description	Indicates the description of the items as specified by the customer.
Order Qty	Indicates the quantity of items ordered.
Ship Qty	Indicates the quantity of items shipped.
UOM	Indicates the unit of measure for the item.
Footer Message	Indicates the footer information provided by the Sponsor. For example, information about discounts or the return policy, if applicable, may be displayed here.

Note: If order lines from different orders are added in one shipment, then Ship to, Bill to, Order #, and Customer Order # of the first shipment line should be displayed.

Generate a Tracking Number and Print a Carrier Label (Partner Task)

You can use Sterling Supplier Portal to generate a tracking number and print a carrier label. The label will accompany the container in a shipment that is delivered to the consumer or to the retail outlet.

About this task

You can generate a tracking number and print a carrier label only for domestic U.S. shipments.

You can only generate a tracking number and print a carrier label if your Sponsor has included the Advance Shipment Notice (ASN) as a part of the choreography. The Sponsor also must have configured an ASN business rule to allow you to generate a carrier label, and set up your account with IBM for carrier integration.

Sterling Supplier Portal supports carrier labels for Federal Express (FedEx), United States Postal Service (USPS), and United Parcel Service (UPS).

For communities that allow you to generate tracking numbers and print carrier labels, shipments can be created with only one container each.

Ensure that you have disabled the pop-up blockers in your web browser so that the dialog box containing the carrier label is displayed. Acrobat Reader is also needed to view the carrier label in PDF format.

Procedure

To generate a tracking number and print a carrier label for a shipment from the Create Shipment page, follow these steps:

1. From the menu bar, click **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed on the Find Order page. Enter the **Order #** you want to search for. You can also select one of the following options:
   - **is**: The application searches for the exact order number.
   - **starts with**: The application searches for order numbers that start with the specified value.
3. Enter the search criteria and click **Search**
4. The results of the search are displayed in the **Search List** panel. From the list of orders displayed, select the order whose details you want to view and click **View Details**. Alternatively, you can click the corresponding **Order Number** hyperlink.
5. The Order Detail page is displayed. Click **Ship PO**.

   Note: The **Ship PO** option is available as a Related Task only if Advance Shipment Notification (ASN) is a part of the choreography of the community to which the Partners belongs.
6. The Create Shipment page is displayed. Enter values in the following fields and panels:
   - In the **SCAC** box, enter the Standard Carrier Alpha Code (SCAC), which is a unique 2-4 letter code used to identify transportation companies. This must be same as specified in the corresponding Purchase Order (PO).
   - In the **Container** panel, enter the dimensions of the container.
   - In the **Ship To** panel, enter the phone number.
7. Click **Generate Carrier label** to generate and print a carrier label. The shipment is saved as draft and the File Download dialog box is displayed.
   - To view the carrier label in PDF format, click **Open**. The carrier label is displayed in the print size of 4X6. You can print this carrier label using any printer.
   - To save the carrier label, click **Save**.

     Though the tracking number is generated, the **Tracking #** field is not populated when you click **Generate Carrier Label**. To view the value in the **Tracking #** field, you have to close the dialog box containing the message that the carrier label is being generated.

What to do next

To generate a tracking number and print a carrier label for a shipment from the Resend Shipment page:

1. From the menu bar, navigate to **My Documents** > **Orders**.

2. The **Search Criteria - Find Order** panel is displayed on the Find Order page. Enter the **Order #** you want to search for. You can also select one of the following options:
   * **is**: The application searches for the exact order number.
   * **starts with**: The application searches for order numbers that start with the specified value.
3. Enter the search criteria and click **Search**.
4. The results of the search are displayed in the **Search List** panel. Select the check box against the appropriate order and click **View Details**. Alternately, click the **Order Number** hyperlink to view the order details.
5. The Order Detail page is displayed. Click **View Shipments**.

   Note: In the Related Task, the **View Shipments** option is available only if your Sponsor has included it as a part of the choreography for the community.
6. The Shipment Detail page is displayed, containing the details of the shipment associated with the order you specified. Click the **Resend ASN** related task.
7. The Resend Shipment page is displayed. Enter values in the following fields and panels:
   * In the **SCAC** box, enter the Standard Carrier Alpha Code (SCAC), which is a unique 2-4 letter code used to identify transportation companies. This must be same as specified in the corresponding Purchase Order (PO).
   * In the **Container** panel, enter the dimensions of the container.
   * In the **Ship To** panel, enter the phone number.
8. Click **Generate Carrier label** to generate and print a carrier label. The shipment is saved as draft and the File Download dialog box is displayed.
   * To view the carrier label in PDF format, click **Open**. The carrier label is displayed in the print size of 4X6. You can print this carrier label using any printer.
   * To save the carrier label, click **Save**.

     Though the tracking number is generated, the **Tracking #** field is not populated when you click **Generate Carrier Label**. To view the value in the **Tracking #** field, you have to close the dialog box containing the message that the carrier label is being generated.
9. Click Resend ASN.

Note: Ensure that you resend the shipment, otherwise your Sponsor will not have the latest shipment with the generated tracking number.

Regenerate a Tracking Number and Print a Carrier Label

You can use Sterling Supplier Portal to regenerate a new tracking number and print a carrier label for the container in a shipment after the carrier label has already been printed once. The previous tracking number is voided by the system.

About this task

You can generate a tracking number and print a carrier label only for domestic U.S. shipments.

You can only generate a tracking number and print a carrier label if your Sponsor has included the Advance Shipment Notice (ASN) as a part of the choreography. The Sponsor also must have configured an ASN business rule to allow you to generate a carrier label, and set up your account with IBM for carrier integration.

Sterling Supplier Portal supports carrier labels for Federal Express (FedEx), United States Postal Service (USPS), and United Parcel Service (UPS).

For communities that allow you to generate tracking numbers and print carrier labels, shipments can be created with only one container each.

Ensure that you have disabled the pop-up blockers in your web browser so that the dialog box containing the carrier label is displayed. Acrobat Reader is also needed to view the carrier label in PDF format.

Procedure

To regenerate and print a carrier label from the Create Shipment page, follow these steps:

1. In the **Overview** panel of the Home page, click the **Number** hyperlink adjacent to **Saved as Draft**.
2. The Drafts page containing the saved documents is displayed. Click the **Subject** hyperlink corresponding to the shipment for which you want to regenerate a tracking number and print a carrier label.
3. The Create Shipment page is displayed. Enter values in the following fields and panels:
   - In the **SCAC** box, enter the Standard Carrier Alpha Code (SCAC), which is a unique 2-4 letter code used to identify transportation companies. This must be same as specified in the corresponding Purchase Order (PO).
   - In the **Container** panel, enter the dimensions of the container.
   - In the **Ship To** panel, enter the phone number.
4. Click **Regenerate Carrier label** to regenerate and print a carrier label. The shipment is saved as draft and the File Download dialog box is displayed.
   - To view the carrier label in PDF format, click **Open**. The carrier label is displayed in the print size of 4X6. You can print this carrier label using any printer.
   - To save the carrier label, click **Save**.

     Though the tracking number is generated, the **Tracking #** field is not populated when you click **Regenerate Carrier Label**. To view the value in the **Tracking #** field, you have to close the dialog box containing the message that the carrier label is being generated.

What to do next

To regenerate a tracking number and print a carrier label for a shipment from the Resend Shipment page:

1. From the menu bar, navigate to **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed on the Find Order page. Enter the **Order #** you want to search for. You can also select one of the following options:
   - **is**: The application searches for the exact order number.
   - **starts with**: The application searches for order numbers that start with the specified value.
3. Enter the search criteria and click **Search**.
4. The results of the search are displayed in the **Search List** panel. Select the check box against the appropriate order and click **View Details**. Alternately, click the **Order Number** hyperlink to view the order details.

5. The Order Detail page is displayed. Click **View Shipments**.

   Note: In the Related Task, the **View Shipments** option is available only if your Sponsor has included it as a part of the choreography for the community.
6. The Shipment Detail page is displayed, containing the details of the shipment associated with the order you specified. Click the **Resend ASN** related task.
7. The Resend Shipment page is displayed. Enter values in the following fields and panels:
   - In the **SCAC** box, enter the Standard Carrier Alpha Code (SCAC), which is a unique 2-4 letter code used to identify transportation companies. This must be same as specified in the corresponding PO.
   - In the **Container** panel, enter the dimensions of the container.
   - In the **Ship To** panel, enter the phone number.
8. Click **Regenerate Carrier label** to regenerate and print a carrier label. The shipment is saved as draft and the File Download dialog box is displayed.
   - To view the carrier label in PDF format, click **Open**. The carrier label is displayed in the print size of 4X6. You can print this carrier label using any printer.
   - To save the carrier label, click **Save**.

     Though the tracking number is generated, the **Tracking #** field is not populated when you click **Regenerate Carrier Label**. To view the value in the **Tracking #** field, you have to close the dialog box containing the message that the carrier label is being generated.
9. Click **Resend ASN**.

Note: Ensure that you resend the shipment, otherwise your Sponsor will not have the latest shipment with the newly generated tracking number.

Reprint a Carrier Label (Partner Task)

You can use Sterling Supplier Portal to reprint a carrier label for the container in a shipment for which a carrier label has already been printed.

About this task

You can print a carrier label only for domestic U.S. shipments.

You can only print a carrier label if your Sponsor has included the Advance Shipment Notice (ASN) as a part of the choreography. The Sponsor also must have configured an ASN business rule to allow you to generate a carrier label, and set up your account with IBM for carrier integration.

Sterling Supplier Portal supports carrier labels for Federal Express (FedEx), United States Postal Service (USPS), and United Parcel Service (UPS).

For communities that allow you to generate tracking numbers and print carrier labels, shipments can be created with only one container each.

Ensure that you have disabled the pop-up blockers in your web browser so that the dialog box containing the carrier label is displayed. Acrobat Reader is also needed to view the carrier label in PDF format.

Procedure

To reprint a carrier label for a shipment from the Create Shipment page, follow these steps:

1. From the menu bar, click**My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed on the Find Order page. Enter the **Order #** you want to search for. You can also select one of the following options:
   - **is**: The application searches for the exact order number.
   - **starts with**: The application searches for order numbers that start with the specified value.
3. Enter the search criteria and click **Search**.
4. The results of the search are displayed in the **Search List** panel. From the list of orders displayed, select the order whose details you want to view and click **View Details**. Alternatively, you can click the corresponding **Order Number** hyperlink.
5. The Order Detail page is displayed. Click **Ship PO**.

   Note: The **Ship PO** option is available as a Related Task only if Advance Shipment Notification (ASN) is a part of the choreography of the community to which the Partners belongs.
6. The Create Shipment page is displayed. Click **Reprint Carrier label** to reprint a carrier label.
7. In the File Download dialog box, perform any one of the following tasks:
   - To open the carrier label in PDF format, click **Open**. The carrier label is displayed in PDF format. You can print this carrier label using any printer in the print size of 4X6.
   - To save the carrier label, click **Save**.

What to do next

To reprint a carrier label for a shipment from the Shipment Detail page:

1. From the menu bar, navigate to **My Documents** > **Shipments**.
2. The **Search Criteria - Find Shipment** panel is displayed on the Find Shipment page. Enter the search criteria and click **Search**.
3. The results of the search are displayed in the **Search List** panel. From the list of shipments displayed, select the shipment whose details you want to view and click **View Details**. Alternatively, you can click the corresponding **Shipment Number** hyperlink.
4. The Shipment Detail page is displayed. Click **Reprint Carrier label** to reprint a carrier label.
5. In the File Download dialog box, perform any one of the following tasks:
   - To open the carrier label in PDF format, click **Open**. The carrier label is displayed in PDF format. You can print this carrier label using any printer in the print size of 4X6.
   - To save the carrier label, click **Save**.

To reprint a carrier label for a shipment from the Resend Shipment page:

1. From the menu bar, navigate to **My Documents** > **Orders**.

2. The **Search Criteria - Find Order** panel is displayed on the Find Order page. Enter the **Order #** you want to search for. You can also select one of the following options:

   - **is**: The application searches for the exact order number.
   - **starts with**: The application searches for order numbers that start with the specified value.

3. Enter the search criteria and click **Search**.

4. The results of the search are displayed in the **Search List** panel. Select the check box against the appropriate order and click **View Details**. Alternately, click the **Order Number** hyperlink to view the order details.

5. The Order Detail page is displayed. Click **View Shipments**.

   Note: In the Related Task, the **View Shipments** option is available only if your Sponsor has included it as a part of the choreography for the community.

6. The Shipment Detail page is displayed, containing the details of the shipment associated with the order you specified. Click the **Resend ASN** related task.

7. The Resend Shipment page is displayed. Click **Reprint Carrier label** to reprint a carrier label.

8. In the File Download dialog box, perform any one of the following tasks:

   - To open the carrier label in PDF format, click **Open**. The carrier label is displayed in PDF format. You can print this carrier label using any printer in the print size of 4X6.
   - To save the carrier label, click **Save**.
   - To close the dialog box, click **Cancel**.

Generate and Print Container Labels (Partner Task)

Your Sponsor can make packing items in cases, pallets, or both a mandatory task when configuring the community. In such a scenario, you cannot send a shipment before packing the complete shipment in cases, pallets, or both. After packing, Sterling Supplier Portal enables you to generate and print the corresponding container labels that will accompany the containers in the shipment.

If your Sponsor has not made packing a mandatory task when configuring the community, you will not be able to perform packing or generate container labels.

You can pack an order from the Homepage, and generate and print a container label from the Pack Shipment Wizard. You can also generate and print a container label directly from the Shipment Detail screen and Resend Shipment screen.

- Generate and Print Container Labels from the Home Page
- Generate and Print Container Labels from the Shipment Detail Screen

Generate and Print Container Labels from the Home Page
About this task

You can pack an order from the Homepage and generate and print a container label from the Pack Shipment Wizard.

To generate and print container labels from the Home page, follow these steps.:

Procedure

1. In the Home page, enter the order number of the order that you want to pack in the **Order #** field of the **Overview** panel.

2. Click **Pack**.

   Note: Ensure that you enter a valid order number. If Acknowledgement is part of the community choreography, ensure the order to be packed is acknowledged. Otherwise, the "Order cannot be packed in this status" error message is displayed.

3. The Pack Shipment Wizard is displayed. Pack the items in containers.
4. After packing the items in the Container Build dialog box, click **Finish**.
5. The File Download dialog box is displayed.
   - To view the container labels in PDF format, click **Open**. To view the container labels in PDF format, click **Open**. The container labels for all the cases and pallets are displayed in the print size of 4X6 each. You can print these container labels using a PDF compatible printer. These container labels are generated in the same order as you packed the items in the cases or pallets.
   - To save the container labels, click **Save**.

Generate and Print Container Labels from the Shipment Detail Screen

About this task

To generate and print a container label from the Shipment Detail screen, follow these steps.

Procedure

1. From the menu bar, navigate to **My Documents** > **Shipments**.
2. The **Search Criteria - Find Shipment** panel is displayed in the Find Shipment screen. Enter the search criteria and click **Search**.
3. The results of the search are displayed in the **Search List** panel of the Search Criteria screen. From the list of shipments, select the shipment that has already been packed in containers, and click **View Details**.
4. The Shipment Detail screen is displayed. Click **Generate Container Label**.
5. The File Download dialog box is displayed.
   - To view the container labels in PDF format, click **Open**. The container labels for all the cases and pallets are displayed in the print size of 4X6 each. You can print these container labels using a PDF compatible printer. These container labels are generated in the same order as you packed the items in the cases or pallets.
   - To save the container labels, click **Save**.

Generate and Print Container Labels from the Resend Shipment Screen

About this task

To generate and print a container label from the Resend Shipment screen, follow these steps.

Procedure

1. From the menu bar, navigate to **My Documents** > **Shipments**.
2. The **Search Criteria - Find Shipment** panel is displayed in the Find Shipment screen. Enter the search criteria and click Search.

3. The results of the search are displayed in the **Search List** panel of the Search Criteria screen. From the list of shipments, select the shipment that has already been packed in containers, and click **View Details.**

4. The Shipment Detail screen is displayed. Click **Resend ASN**.

5. The Resend Shipment screen is displayed. Click **Generate Container Label.**

6. The File Download dialog box is displayed.

   - To view the container labels in PDF format, click **Open**. The container labels for all the cases and pallets are displayed in the print size of 4X6 each. You can print these container labels using a PDF compatible printer. These container labels are generated in the same order as you packed the items in the cases or pallets.

   - To save the container labels, click **Save**.

   Sterling Supplier Portal supports the GS1-128 format for the container labels. The following default container label is provided by Sterling Supplier Portal. To customize the default container label to suit your requirements, your Sponsor will need to contact IBM.

The following table describes the fields that make up the out-of-the-box container label:

Field	Description
FROM	Indicates the address of the company from which the order is shipped. This field contains the following address details: • Company: Indicates the name of the company from which the order is shipped. • Address Line 1: Indicates the first line of the company address. • Address Line 2: Indicates the second line of the company address. • City: Indicates the name of the city. • State: Indicates the name of the state. • Zip Code: Indicates the zip code. • Country: Indicates the name of the country.
TO	Indicates the address of the company to which the order is shipped. This field contains the following address details: • Company: Indicates the name of the company to which the order is shipped. • Address Line 1: Indicates the first line of the company address. • Address Line 2: Indicates the second line of the company address. • City: Indicates the name of the city. • State: Indicates the name of the state. • Zip Code: Indicates the zip code. • Country: Indicates the name of the country.
SHIP TO POST	Indicates the carrier routing bar code. In this code, (420) is the application identifier of the zip code of the company to which the container is shipped. For example, in the illustrated container label, (420) 08016 indicates the carrier routing bar code. Here, 08016 is the zip code of the company. **Note:** When this code is scanned, all the spaces and special characters are ignored.
CARRIER	Indicates the carrier used to ship the container.
SHIPMENT #	Indicates the shipment number to which the container belongs. If the shipment number is more than 12 characters long, only 12 characters are displayed and the remaining characters are truncated.
<sequence of container label>	Indicates the sequence of the container label. This sequence might not be the same as the sequence number of the containers in which the items are packed.
PO #	Indicates the order number to which the shipment belongs. If the container contains items from multiple orders, Multiple is displayed in this field.
ITEM DESC	Indicates the item description. The system supports only five items for which descriptions can be displayed. **Note:** If you have configured an item rule such that your Item ID is different from the customer's Item ID, the system displays the customer's item description in this field. If the customer's item description is not found, your item description is displayed. If the item description is not found, this field is displayed as blank.

Field	Description
ITEM ID	Indicates the unique identifier of the item. The system supports only five items for which IDs can be displayed. **Note:** If you have configured an item rule such that your Item ID is different from the customer's Item ID, the system displays the customer's item ID in this field. If the customer's item description is not found, your item ID is displayed.
QTY	Indicates the quantity of an item that is contained in the container. The system supports only five items for which quantity can be displayed.
Free Form Vendor Information	After printing the container label using a PDF compatible printer, enter any additional information, if required.
SSCC	Indicates the Serial Shipping Container Code (SSCC) bar code used to track the container and its contents. The SSCC is a 20 digit code comprised of the sellers EAN/UCC number and a sequence number. It is a mandatory field for UCC/EAN compliance. (00) is the application identifier of the SSCC. For example, in the illustrated container label, (00) 0 0646912 000008970 4 indicates the SSCC bar code for the container label. Here, 0 indicates that the container type is case. 0646912 is the GS1 prefix of the your company. 000008970 is the unique serial number assigned to the container. 4 is the data check character used to ensure data integrity. **Note:** When this code is scanned, all the spaces and special characters are ignored.

Chapter 33. Vendor Compliance Module

About Vendor Compliance (Partner Task)

The Vendor Compliance is an optional module that allows Sterling Supplier Portal Sponsors to set up and enforce compliance levels with their Supplier.

When tolerances are exceeded, such as shipments being delivered late or inaccurate quantities being shipped, the condition is detected. Both you and your Sponsor are notified:

* Your Sponsor is notified through the Sterling Supply Chain Visibility application. In Sterling Supply Chain Visibility, your *Sponsor* is called the *Buyer*.
* Your Partner organization is notified through your Sterling Supplier Portal Dashboard. In Sterling Supply Chain Visibility, the *Partner* organization is called the *Seller*.

Your Sponsor sets up compliance tolerances, chargeback amounts (financial penalties), and other compliance criteria. When a noncompliance event occurs, a process begins that brings a resolution within a specific time frame, called the mediation period. At the end of the mediation period, your Sponsor can bill you for the chargeback in the manner that your organizations agreed to.

As a Sterling Supplier Portal Partner, you can view all chargebacks that are sent to you, and you can enter private notes into the system.

Vendor Compliance Process

The following workflow describes the sequence of events in the Vendor Compliance process.

In this workflow, your *Sponsor* is referred to as the *Buyer*. Your *Partner* organization is referred to as the *Supplier*.

1. A noncompliant event is detected.

> Sterling Supply Chain Visibility detects a noncompliant condition, such as a late shipment or inaccurate shipment quantity.

> An external document that is sent from a Buyer ERP system to Sterling Supply Chain Visibility can also trigger a noncompliance event.

2. The Supplier and Buyer are notified.

> Sterling Supply Chain Visibility sends a chargeback notice to the Sterling Supplier Portal Partner dashboard to notify the Supplier of the compliance violation and the chargeback amount.

> This information is also presented to the Buyer in Sterling Supply Chain Visibility.

> In addition, Sterling Supply Chain Visibility begins a countdown for this event, which is called the mediation period. The Vendor Compliance process is concluded at the end of this time frame.

3. Dispute mediation.

The Buyer and Supplier can meet to perform any dispute mediation or negotiation. This process is done outside of the IBM supply chain applications.

4. Manual Chargeback adjustment or cancellation.

Depending on the outcome of the dispute mediation, the Buyer can manually adjust or waive the compliance penalty, or can cancel the chargeback.

If a chargeback is adjusted or canceled, Sterling Supplier Portal notifies the Supplier by sending a new chargeback notice to the Sterling Supplier Portal Partner Dashboard.

5. Final Chargeback is distributed.

At the end of the mediation period, Sterling Supply Chain Visibility can optionally route the final chargeback to a Buyer ERP system, such as a billing system.

View the Chargeback Details (Partner Task)

You can use Sterling Supplier Portal to view the details for the chargebacks you receive from your Sponsor.

Procedure

To search for chargebacks, follow these steps:

1. From the menu bar, click **My Documents** > **Chargebacks**.
2. The Search Criteria panel is displayed on the Chargeback Search page. Enter the search criteria and click **Search**.

   The following table describes the actions and fields in the Search Criteria panel on the Chargeback Search page.

Action	Description
Saved Searches	Click this to view the saved searches.
Save this Search	Click this to open the Save Search page, where you can enter a name for your saved search. If you want the search to be run automatically, select the **Auto Execute** check box.
Field	**Description**
Event Name	Enter the event name you want to search for. You can also select one of the following options: • **is**: The application searches for the exact event name. • **starts with**: The application searches for event names that start with the specified value. • **contains**: The application searches for event names that contain the specified value.

Order #	Enter the order number you want to search for. You can also select one of the following options: • **is**: The application searches for the exact order number. • **starts with**: The application searches for order numbers that start with the specified value. This search option applies to chargebacks that were generated from order-based events.
Community	Enter a community name to search for chargebacks that apply to this community. Your Sponsor created the communities and assigned the partner organizations to the community. Alternatively, click 🔍 to search for a community.
Shipment #	Enter the shipment number you want to search for. This search option applies to chargebacks that were generated from shipment-based events.
Amount	Enter the chargeback amount to be included in the search. You can also select one of the following qualifiers to direct your search for an amount: **is**: when selected, the application searches for the exact value entered. **greater than or equal to:** when selected, the application searches for all the values that are greater than or equal to the value entered. **less than or equal to:** when selected, the application searches for all the values that are less than or equal to the value entered. **not equal to:** when selected, the application searches for all the values that do not match the value entered. **less than:** when selected, the application searches for all the values that are less than the value entered. **greater than:** when selected, the application searches for all the values that are greater than the value entered.
Invoice #	Enter the invoice number to be included in the search. This is applicable only for the chargebacks generated from invoice based events.
Event Date	Enter the date range between which the chargeback was created, and which is to be included in the search. Alternatively, click 📅 to select the date range.
Charged Date	Enter the date range between which the chargeback was finalized, and which is to be included in the search. Alternatively, click 📅 to select the date range.
Transaction Id	Enter the transaction ID to be included in the search. The transaction ID is a unique alphanumeric code that is generated for each chargeback.
Supplier	From the drop-down list, select the supplier to be included in the search. This field is displayed only for a Service Agent.
Max Records	Enter the maximum number of records to be displayed as Search results.

3. The Listing panel is displayed with the list of chargebacks. From this list, select the check box against the event date whose details you want to view and click **View Details**. The Chargeback Detail page is displayed.

The following table describes the fields and the action in the Listing panel on the Find Order page.

Action	Description
View Details	Select the check box adjacent to the required Event Date, and click this action to view the Chargeback Detail page of the corresponding event.
Export List as CSV	Click this action to view the Chargeback list in CSV format. Based on the search criteria, up to 1000 records can be exported in CSV format. **Note:** When you export the Chargeback List Report in CSV format, the Event Name, Order #, Shipment #, Invoice #, and Receiving Location fields are prefixed with single quotes. You can double-click these fields to view their exact values. This is a pre-existing behavior for order listing pages.
Field	**Description**
Event Date	Shows the event date.
Event Name	Shows the event name.
Community	Shows the community that is created by the Sponsor.
Supplier	Shows the name and ID of the supplier against whom the chargeback is raised. This field is displayed only for a Service Agent.
Amount	Shows the chargeback amount in the specified currency.
Order #	Shows the order number for which the chargeback is generated.
Shipment #	Shows the shipment number for which the chargeback is generated.
Invoice #	Shows the invoice number of the order for which the chargeback is generated.
Transaction Id	Shows the transaction ID of the chargeback. The transaction ID is a unique alphanumeric code that is generated for each chargeback.
Charged Date	Shows the date on which the chargeback is finalized.
Status	Shows the current status of the chargeback.

The following table describes the fields in the Chargeback Amount panel on the Chargeback Detail page. If you are viewing the details pertaining to a changed Chargeback, the Changed Chargeback Detail page is displayed.

Action	Description
Related Tasks	Click this to perform the additional task related to Chargeback. You can perform the following task: View Non-Compliance Summary - Click this to view the noncompliance summary report for the chargeback.
Field	**Description**
Chargeback Amount	Shows the value of the chargeback amount in the specified currency. This panel also displays the event name, the status of the chargeback, and the charged date.

The following table describes the fields and the action in the Primary Information panel on the Chargeback Detail page. If you are viewing the details pertaining to a changed Chargeback, the Changed Chargeback Detail page is displayed.

Action	Description
Additional Reference(s)	Click this to view the additional references in the chargeback. You can view the reference name and reference value.
Field	**Description**
Transaction Id	Shows the transaction ID of the chargeback. The transaction ID is a unique alphanumeric code that is generated for each chargeback.
Customer	Shows the name of the customer. Click the **Customer** hyperlink to view the details of the customer.
Event Date	Shows the date on which the chargeback was created.
Order #	Shows the order number associated with this chargeback. Click the **Order Number** hyperlink to view the Order Detail page, which displays the details of the selected Order Number.
	The hyperlink is displayed only if the order number exists in the system.
Shipment #	Shows the shipment number. Click the **Shipment Number** hyperlink to view the Shipment Detail page, which displays the details of the selected Shipment Number.
	The hyperlink is displayed only if the shipment number exists in the system.
Invoice #	Shows the Invoice number. Click the **Invoice Number** hyperlink to view the Invoice Detail page, which displays the details of the selected Invoice Number.
	The hyperlink is displayed only if the invoice number exists in the system.
Community	Shows the community that is created by the Sponsor. Click the **Community** hyperlink to view the business rules set by the Sponsor for the community.
Supplier	Shows the name and ID of the supplier against whom the chargeback is raised. This field is displayed only for a Service Agent.
Detail	Provides the details about the chargeback. **Note:** Up to 4000 characters can be used in this text box.

The following table describes the fields and actions described in the Private Notes panel on the Chargeback Detail page. If you are viewing the details pertaining to a changed Chargeback, the Changed Chargeback Detail page is displayed.

Action	Description
Add Private Note	Click this to enter additional information about the chargeback. Enter the required note in the Add Private Note dialog window and click **Save** to add the contents. **Note:** Up to 250 characters can be used in this text box.

Action	Description
The Private Notes panel displays notes added for the chargeback by various users. This panel also displays the user name, date, and the time when the note was added. These private notes are not shared with the customer and can only be viewed by the supplier. They are intended to allow the supplier to add notes to the chargeback for their viewing only.	

The following table describes the fields and actions described in the Audits panel on the Chargeback Detail page. If you are viewing the details pertaining to a changed Chargeback, the Changed Chargeback Detail page is displayed.

Field	Description
Modified On	Shows the date and time when the chargeback was modified.
Old Amount	Shows the chargeback amount before the modification.
New Amount	Shows the modified chargeback amount.
Reason Code	Shows the reason code for modifying the chargeback amount or cancelling the chargeback.
Reason Text	Shows the description for the change in the value of the chargeback amount or cancellation of the chargeback.

Non-Compliance Summary Report (Partner Task)

About this task

You can view the non-compliance summary report that provides information about the chargeback documents, the chargeback amount for an event in a particular month, and the number of chargebacks in a month.

The non-compliance summary report is displayed as a chart and a table. This report enables you to view the number of chargebacks and the chargeback amount summarized for the last the 12 months and the current month.

To view the non-compliance summary report, follow these steps.

Procedure

1. From the menu bar, navigate to **Reports** > **Non-Compliance Summary**.
2. The Non-Compliance Summary screen is displayed. By default, this screen displays non-compliance summary information pertaining to various events for the last 12 months and the current month. If you are a **Service Agent**, select the required filter criteria and click **Apply**. For **Service Agent**, by default, no data is displayed.

   The following table describes the fields in the **Non-Compliance Summary - Chart** panel of the Non-Compliance Summary screen:

Field	Description
Supplier	From the drop-down list, select the supplier to be included in the chart. If you do not select any supplier, the chart is displayed for all the suppliers. This field is displayed only for Service Agent.
Transaction Period	From the drop-down list, select the transaction period to be included in the chart. This field is displayed only for a Service Agent.
Amount	Indicates the chargeback amount for the corresponding month and event.

Field	Description
Count	Indicates the number of chargebacks for the corresponding month.
Month	Indicates the month for which the chargeback is applied.
The line graph represents the number of chargeback documents received in a month and the bar graph represents the chargeback amount for a month.	

The following table describes the fields the **Non-Compliance Summary - Data** panel of the Non-Compliance Summary screen:

Field	Description
Month	Indicates the month for which the chargeback is applied. To view the chargeback details for the selected month, you can click the month hyperlink to display the Chargeback Search screen.
Supplier	Indicates the name and ID of the supplier against whom the chargeback is raised. This field is displayed only for a Service Agent.
Event Name	Indicates the event name.
Amount	Indicates the chargeback amount for an event in the specified month.
Count	Indicates the number of chargebacks for an event in the specified month.

Chapter 34. View the Details of an Agreement (Partner Task)

You can use Sterling Supplier Portal to view the agreements you have entered into with your Sponsors. The agreements are an arrangement that is accepted by the parties involved.

Procedure

To view the details of an agreement, follow these steps:

1. In the Sterling Supplier Portal Console, click **Setup** > **Configure My Profile** > **View Agreements**. The Agreement Search page is displayed.

   The following table describes the fields and actions in the Search Criteria panel on the Agreement Search page:

Action	Description
Saved Searches	Click **Saved Searches** to view your saved searches.
Save this Search	Opens the Save Search page, where you can enter a name for your saved search. If you want the search to be run automatically, select the **Auto Execute** check box.
Field	**Description**
Sponsor Name	Enter the Sponsor you want to search for.
Program Name	Enter the program you want to search for. You can also click 🔍 to search for a specific program.
Question Block Category	Select the question block category you want to search for.
Effect Start Date From	Enter the effective date of the agreements you want to search for. This date shows the start date that the agreement took effect. You can also click 📅 to select the date. Use the **within** option to add more days to the date search range.
Expiry Date	Enter the expiration date of the agreements you want to search for. You can also click 📅 to select the date. Use the **within** option to add more days to the date search range.
Status	Select the status to be included in the search: • Active • Soft Delete • Pending
Max Records	Enter the maximum number of records to include in the search results.

2. Select the agreement and click **View Details**. The Agreement Detail page is displayed.

   The following table describes the fields in the Listing Records panel on the Agreement Detail page:

Action	Description
Export Details as XML	Exports the details of the selected agreements in XML format.
Export Details as PDF	Exports the details of the selected agreements in PDF format.
Terminate Agreement	Terminates the selected agreement.
Field	**Description**
Agreement ID	Shows the unique identifier of the agreement.
Campaign Name	Shows the name of the campaign that is associated with the agreement.
Sponsor Name	Shows the Sponsor name.
Effective Start Date	Shows the date the agreement takes effect.
Effective End Date	Shows the date the agreement expires.
Status	Shows the current status of the agreement, such as Active or Pending.

The following table describes the fields in the Agreement Dates panel on the Agreement Details page.

Field	Description
Agreement Start Date	Enter the effective date of the agreement.
Program Name	Enter the program name.
Sponsor Name	Enter the Sponsor name.
Partner Name	Enter the Partner name.

The My Answer Block(s) panel displays the answer block.

The Sponsor Answer Block(s) panel displays the Partner's answer block.

The following table describes the fields in the Contact panel on the Agreement Detail page.

Field	Description
Contact Name	Shows the name of the contact person in the Sponsor organization.
Email	Shows the e-mail address of the contact person.
Daytime Phone #	Shows the daytime telephone phone number of the contact person.
Mobile Phone #	Shows the mobile telephone number of the contact person.
Fax #	Shows the fax number of the contact person.
Job Title	Shows the job title of the contact person.

Chapter 35. Catalogs

Add an Item to the Catalog (Partner Task)

About this task

You should add items to the catalog if you want to link your corresponding Item IDs with that of your customers. For a particular item, you can define Color, Size, Product, Sub Product, and General Description in addition to the Item ID and Item Description. However, each Item ID can have only one set of these five attributes. Though you can define attributes of an item, the Order Detail screen, Shipment Detail screen, and Invoice Detail screen display the attributes as specified in the corresponding order by your Sponsor.

Note: If you have configured a rule for the item such that your Item ID is different from the customer's Item ID, these attributes of the item are not considered when matching the items.

To add an item to the catalog, follow these steps.

Procedure

1. From the menu bar, navigate to Setup > **Manage Items**.
2. The **Search Criteria - Find Item** panel is displayed in the Find Item screen. Enter the search criteria and click **Search**.
3. The **Search List** panel is displayed with a list of items. Click **Add**.
4. The Add Item dialog box is displayed. Enter the appropriate values in the fields and click **Save**.

   The following table describes the fields that make up the **Search Criteria - Find Item** panel.

Field	Description
Item ID	Enter the identifier of the item to be included in the search.
Item Description	Enter the description of the item to be included in the search.
Max Records	Indicates the maximum number of items that will be displayed in the Search List panel. You can enter the maximum number of items to be displayed in the search results.

   The following table describes the fields that make up the **Search List** panel.

Field	Description
Item ID	Indicates the identifier of the item.
Item Description	Indicates the description of the item.

   The following table describes the fields that make up the Add Item dialog box.

Field	Description
Item ID	Enter the identifier of the item to be added in the Search List.
Item Description	Enter a brief description of the item.

Field	Description
Color	Enter the color of the item. The system supports a maximum of 40 characters in this field.
Size	Enter the size of the item. The system supports a maximum of 40 characters in this field.
Product	Indicates the name of the product. For example, Apparel. The system supports a maximum of 40 characters in this field.
Sub Product	Indicates the name of the sub product. For example, Shirts. The system supports a maximum of 40 characters in this field.
General Description	Enter additional description of the item, as required. The system supports a maximum of 40 characters in this field.

Manage an Item in the Catalog (Partner Task)

About this task

Sterling Supplier Portal enables Partners to maintain and link their Item IDs with that of their customers.

To manage an item in the catalog, follow these steps.

Procedure

1. From the menu bar, navigate to **Setup** > **Manage Items**.
2. The S**earch Criteria - Find Item** panel is displayed in the Item Search screen. Enter the search criteria and click **Search**.
3. The **Search List** panel is displayed with a list of items. Select the check box against the item that you want to manage and click **Manage Customer's** Item.
4. The Customer's Item dialog box is displayed. Enter the appropriate values in the fields and click **Save**.

   The following table describes the actions and fields that make up the Customer's Item dialog box.

Action	Description
Add/Copy Row	Click this to add a new row, which in turn enables you to select the customer identifier from the drop-down list. You can enter the identifier and the description of the item that belongs to the selected customer. To add multiple rows, enter the number of rows in the text box against Add/Copy and click **Add/Copy**.
Remove Row	Click this to remove a row.
Field	**Description**
Customer	From the drop-down list, select the identifier of the customer.
Item ID	Enter the identifier of the item.
Item Description	Enter a brief description of the item.

Modify an Item in the Catalog (Partner Task)

About this task

You can modify the description of an item in order to link it with the customer's Item ID. You can modify the items that have been added to the catalog. For a

particular item, you can define Color, Size, Product, Sub Product, and General Description in addition to the Item ID and Item Description. However, each Item ID can have only one set of these five attributes. Though you can define attributes of an item, the Order Detail screen, Shipment Detail, and Invoice Detail screen display the attributes as specified in the corresponding order by your Sponsor.

Note:
- If you have configured a rule for the item such that your Item ID is different from the customer's Item ID, these attributes of the item are not considered when matching the items.
- If you have configured a rule for the item such that your Item ID is same as the customer's Item ID and your Sponsor sends a different order containing the same item but different additional attributes, then the additional attributes in the Customer's Item dialog box are automatically overridden.

To modify an item in the catalog, follow these steps.

Procedure

1. From the menu bar, navigate to **Setup** > **Manage Items**.
2. The **Search Criteria - Find Item** panel is displayed in the Find Item screen. Enter the search criteria and click **Search**.
3. The **Search List** panel is displayed with the list of items. Select the check box against the item that you want to modify and click **Modify**.
4. The Modify dialog box is displayed. Enter the new description for the item and click **Save**. This replaces the existing Item Description.

   The following table describes the fields in the Modify dialog box.

Field	Description
Item ID	Indicates the identifier of the item.
Item Description	Enter a brief description for the item.
Color	Enter the color of the item. The system supports a maximum of 40 characters in this field.
Size	Enter the size of the item. The system supports a maximum of 40 characters in this field.
Product	Indicates the name of the product. For example, Apparel. The system supports a maximum of 40 characters in this field.
Sub Product	Indicates the name of the sub product. For example, Shirts. The system supports a maximum of 40 characters in this field.
General Description	Enter additional description of the item, as required. The system supports a maximum of 40 characters in this field.

Delete an Item from the Catalog (Partner Task)

About this task

You should delete items from the catalog if you do not want to link your corresponding Item IDs with that of your customers.

To delete an item from the catalog, follow these steps.

Procedure

1. From the menu bar, navigate to **Setup** > **Manage Items**.
2. The **Search Criteria - Find Item** panel is displayed in the Find Item screen. Enter the search criteria and click **Search**.
3. The **Search List** panel is displayed with the list of items. Select the check box against the corresponding Item ID that you want to delete and click **Delete**.

   To delete all the items from the catalog at the same time, select the check box against the **Item ID** field name and click **Delete**.

Chapter 36. Edit Basic Profile Information (Partner Task)

About this task

Sterling Supplier Portal enables a Partner organization to edit its basic information. Partners supply products to Sponsors (Buyers). Partners are also known as Suppliers.

To edit the basic profile of a Partner organization, follow these steps.

Procedure

1. From the Sterling Supplier Portal Console, navigate to **Setup** > **Configure My Profile** > **Edit Basic Info**.
2. The Edit Basic Information screen is displayed. In the **Edit Basic Information** panel, make the necessary changes, and click **Save**.

   The following table describes the fields that make up the **Edit Basic Information** panel in the Edit Basic Information screen.

Field	Description
Company*	Enter the name of the company.
Address Line 1	Enter the line of the company address.
Address Line 2	Enter the second address line, if applicable.
Address Line 3	Enter the third address line, if applicable.
City	Enter the name of the city.
State/Province	Enter the name of the state.
Zip/Postal Code	Enter the zip code.
Country	Select the name of the country.
Phone #	Enter the phone number of the contact person.
Email ID	Enter the e-mail ID of the contact person.

* = Mandatory field.

Chapter 37. Modify Partner's Public Profile (Partner Task)

About this task

Sterling Supplier Portal enables a Partner organization to modify its public profile. Partners supply products to Sponsors (Buyers). Partner are also known as Suppliers.

To modify the public profile of a Partner organization, follow these steps.

Procedure

1. In the Sterling Supplier Portal Console, navigate to **Setup** > **Configure My Profile** > **Modify Public Profile**.
2. The Modify Public Profile screen is displayed. In the **Modify Public Profile** panel, select the information that you want to make public, and click **Save**.

   Note: A Partner Associate is not allowed to modify the public profile of a Partner's organization.

Chapter 38. Configure a Rule for an Item (Partner Task)

About this task

You can either have the same Item IDs as your Sponsors or Item IDs that are different from that of your Sponsors. Sterling Supplier Portal enables you to configure the rules for Item IDs. These rules enable you to link your Item IDs with your Sponsors' IDs in case the Item IDs are different.

To configure a rule for an item, follow these steps.

Procedure

1. From the menu bar, navigate to **Setup** > **Manage Item Rule**.
2. The Manage Partner's Item screen is displayed. Select one of the following rules and click **Save**.

   Note:
   - **My Item ID is same as Customer's Item ID** - Select this so that your item ID will be same as the Sponsor (seller) item ID.
   - **My Item ID is different from Customer's Item ID** - Select this so that your item ID will be different from the Sponsor (seller) item ID.

Chapter 39. Upload Inventory Information (Partner Task)

The Sponsor might have set up your community to require you to upload an inventory list. You have to upload the inventory details in a Microsoft Excel spreadsheet.

About this task

You can download a sample spreadsheet template from Sterling Supplier Portal. You can update the spreadsheet with your inventory information and then upload the spreadsheet.

You can upload an Excel spreadsheet for only one Sponsor at a time.

Procedure

To upload inventory information, follow these steps:

1. From the menu bar, click **Setup** > **Send Inventory Snapshot**. The Inventory Upload page is displayed.
2. Click the **Download Sample** hyperlink to download the spreadsheet and save it to your computer.
3. Update the following fields in the spreadsheet:

Field	Description
Item ID	Enter the identifier of an item. This field is required. You can enter a maximum of 40 characters for an Item ID.
Quantity	Enter the quantity of available items. This field is required. You can enter a maximum of 14 digits. You can include up to 4 decimal places. If any items are out of stock, mark the quantity as zero in the spreadsheet.
Unit Of Measure	Enter the Unit Of Measure (UOM) of the items, as configured by the Sponsor. This field is required. You can enter a maximum of 40 characters for each UOM.
Product Class	Enter the Product Class of the items, as configured by the Sponsor. You can enter a maximum of 10 characters for a Product Class.
UPC Code	Enter the Universal Product Code of the item. You can enter a maximum of 100 characters for a UPC.
GTIN	Enter the Global Trade Item Number of the item. You can enter a maximum of 128 characters for a GTIN.

4. Click **Upload** to upload the updated sheet:
    a. Select the Sponsor to which you are sending the inventory update. The customer list only shows the Sponsors that require you to send the

inventory updates. If you are a member of more than one community for the same Sponsor, the Sponsor's name and Community ID are both listed.

b. Enter the file name that you want to upload. You can also click **Browse**, navigate to the appropriate folder, and select the file.

Chapter 40. Route Planning

Sending a Shipment for Route Planning (Partner Task)

About this task

If your Sponsor includes Advance Shipment Notice in the choreography of the community to which you belong, and sends an order that requires route planning, then you must send the shipment corresponding to that order for route planning before sending it to the customer. Your Sponsor plans the route, and updates the carrier information, pickup time, and so on.

After you have sent a shipment for route planning, you should receive the route plan by the end of that day. If you do not receive the route plan for the shipment, the **Routing response for <Shipment number> due** task is displayed in the **Overdue Tasks** panel of the dashboard and you can contact your Sponsor.

If you have saved a shipment as a draft, perform the following steps to send the shipment for route planning.

Procedure

1. From the menu bar, navigate to **My Documents** > **Orders**.
2. The **Search Criteria - Find Order** panel is displayed in the Find Order screen. Enter the **Order #** you want to search for. You can also select one of the following options:
   - **is**: The application searches for the exact order number.
   - **starts with**: The application searches for order numbers that start with the specified value.
3. Enter the search criteria and click **Search**.
4. The **Search List** panel is displayed with the list of orders. Select the check box against the order that you want to ship and click **View Details**. Alternatively, you can also click the corresponding **Order Number** hyperlink.
5. The Order Detail screen is displayed. Click **Ship PO**.

   Note: The Ship PO task is available as a Related Task only if ASN is a part of the choreography of the community to which the Partners belongs.
6. The Create Shipment screen is displayed. Enter the appropriate values in the fields.
7. Click the **Send Routing Request** button.

   The shipment is saved as a draft containing read-only fields, and the request for route planning is sent to your Sponsor.
   a. In the Home screen, click **Saved as Draft** in the **Overview** panel.
   b. The Drafts screen is displayed. In the **Drafts** panel, click the link pertaining to the Shipment you want to send for route planning.
   c. The Create Shipment screen is displayed. Enter the appropriate values in the fields.
   d. Click the **Send Routing Request** button.

      The **Send ASN** button is disabled in the Create Shipment screen because you cannot send the shipment unless you receive the corresponding route plan from your Sponsor. The **Routing Request Sent for <Shipment**

number> event is displayed in the **Event Log** panel of the Order Detail screen when you have sent a shipment for route planning. You can view the Create Shipment screen by clicking the Shipment number hyperlink.

After you have sent the shipment for route planning, the **Delete** and **Generate Packing Slip** buttons are enabled.

Note: You cannot send the same shipment for route planning multiple times. The **Send Routing Request** button is removed from the Create Shipment screen after you click it once. If you want to send a new shipment pertaining to the order for route planning, you must delete the shipment and create a new one. However, when a new shipment is created, new tasks are not listed in the Dashboard and the tasks pertaining to the earlier shipment are deleted.

Receiving a Route Plan for a Shipment (Partner Task)

Sterling Supplier Portal enables you to receive a route plan for a shipment.

If you receive an order that requires route planning, you must send the corresponding shipment for route planning. Your Sponsor plans the load and updates the carrier details, pick up time, and so on.

When the route plan for the shipment is received, the **Routing Response Received for <Shipment number>** event is displayed in the **Event Log** panel in the Order Detail screen. The fields that your Sponsor has modified are automatically updated in the corresponding draft form of the shipment. You can click the **Shipment Number** hyperlink adjacent to the **Routing Response Received for <Shipment number>** event in the **Event Log** panel to view the updated Create Shipment screen. All the buttons are enabled and you can perform other tasks pertaining to the shipment such as generating a Packing Slip, sending the shipment to your Sponsor, and so on.

After sending the shipment for route planning, if you do not receive the route plan by the end of that day, the **Routing response for <Shipment number> due** task is generated the next day in the **Overdue Tasks** panel of the Dashboard. You can contact your Sponsor for the route plan.

After you send out a shipment for route planning, you may receive multiple load updates until this shipment is finally sent to your Sponsor. Each load update can consist of multiple shipments. When you receive the route plan you can send the shipment to your Sponsor. After you have sent the shipment to your Sponsor, you can perform tasks such as sending an invoice for the shipment based on the choreography selected by your Sponsor for the community to which you belong.

Chapter 41. Currency Codes

In Sterling Supplier Portal, currency amounts are displayed with the associated currency code.

The following currencies are displayed as symbols:

- USD Dollars (USD)- $
- Euros (EUR)- €
- British Pounds (GBP)- £

Sterling Supplier Portal supports the following currency codes:

Currency Code	Country and Currency
AED	United Arab Emirates, Dirham
AFN	Afghanistan, Afghani
ALL	Albania, Lek
AMD	Armenia, Dram
ANG	Netherlands, Antillean Guilder
AOA	Angola, Kwanza
ARS	Argentina, Peso
AUD	Australia, Dollar
AWG	Aruba, Florin
AZN	Azerbaijan, Manat
BAM	Bosnia And Herzegovina, Convertible Mark
BBD	Barbados, Dollar
BDT	Bangladesh, Taka
BGN	Bulgaria, Lev
BHD	Bahrain, Dinar
BIF	Burundi, Franc
BMD	Bermuda, Dollar
BND	Brunei, Dollar
BOB	Bolivia, Boliviano
BRL	Brazil, Real
BSD	Bahamas, Dollar
BTN	Bhutan, Ngultrum
BWP	Botswana, Pula
BYR	Belarus, Ruble
BZD	Belize, Dollar
CAD	Canada, Dollar
CDF	Democratic Republic of Congo, Franc
CHE	Switzerland, WIR Bank (Complementary Currency)
CHF	Switzerland, Franc

Currency Code	Country and Currency
CHW	Switzerland, WIR Bank (Complementary Currency)
CLP	Chile, Peso
CNY	China, Yuan Renminbi
COP	Colombia, Peso
COU	Colombia, Unidad de Valor Real
CRC	Costa Rica, Colon
CUC	Cuba, Convertible Peso
CUP	Cuba, Peso
CVE	Cape Verde, Escudo
CZK	Czech Republic, Koruna
DJF	Djibouti, Franc
DKK	Denmark, Krone
DOP	Dominican Republic, Peso
DZD	Algeria, Dinar
EEK	Estonia, Kroon
EGP	Egypt, Pound
ERN	Eritrea, Nakfa
ETB	Ethiopia, Birr
FJD	Fiji, Dollar
FKP	Falkland Islands, Pound
GEL	Georgia, Lari
GHS	Ghana, Cedi
GIP	Gibraltar, Pound
GMD	Gambia, Dalasi
GNF	Guinea, Franc
GTQ	Guatemala, Quetzal
GYD	Guyana, Dollar
HKD	Hong Kong, Dollar
HNL	Honduras, Lempira
HRK	Croatia, Kuna
HTG	Haiti, Gourde
HUF	Hungary, Forint
IDR	Indonesia, Rupiah
ILS	Israel, New Sheqel
INR	India, Rupee
IQD	Iraq, Dinar
IRR	Iran, Rial
ISK	Iceland, Krona
JMD	Jamaica, Dollar
JOD	Jordan, Dinar
JPY	Japan, Yen

Currency Code	Country and Currency
KES	Keny, Shilling
KGS	Kyrgyzstan, Som
KHR	Cambodia, Riel
KMF	Comoros, Franc
KPW	North Korea, Won
KRW	South Korea, Won
KWD	Kuwait, Dinar
KYD	Cayman Islands, Dollar
KZT	Kazakhstan, Tenge
LAK	Laos, Kip
LBP	Lebanon, Pound
LKR	Sri Lanka, Rupee
LRD	Liberia, Dollar
LSL	Lesotho, Loti
LTL	Lithuania, Litas
LVL	Latvia, Lats
LYD	Libya, Dinar
MAD	Morocco, Dirham
MDL	Moldova, Leu
MGA	Malagascar, Ariary
MKD	Republic of Macedonia, Denar
MMK	Myanmar, Kyat
MNT	Mongolia, Tugrik
MOP	Macau, Pataca
MRO	Mauritania, Ouguiya
MUR	Mauritius, Rupee
MVR	Maldives, Rufiyaa
MWK	Malawi, Kwacha
MXN	Mexico, Peso
MYR	Malaysia, Ringgit
MZN	Mozambique, Metical
NAD	Namibia, Dollar
NGN	Nigeria, Naira
NIO	Nicaragua, Cordoba Oro
NOK	Norway, Krone
NPR	Nepal, Rupee
NZD	New Zealand, Dollar
OMR	Oman, Rial
PAB	Panama, Balboa
PEN	Peru, Nuevo Sol
PGK	Papua New Guinea, Kina

Currency Code	Country and Currency
PHP	Philippines, Peso
PKR	Pakistani, Rupee
PLN	Poland, Zloty
PLZ	Poland, Zloty
PYG	Paraguay, Guarani
QAR	Qatar, Rial
ROL	Romania, Lei
RON	Romania, New Leu
RSD	Serbia, Dinar
RUB	Russia, Rouble
RUR	Russia, Rouble
RWF	Rwanda, Franc
SAR	Saudi Arabia, Riyal
SBD	Solomon Islands, Dollar
SCR	Seychelles. Rupee
SDG	Sudan, Pound
SEK	Sweden, Krona
SGD	Singapore, Dollar
SHP	Saint Helena, Pound
SLL	Sierra Leone, Leone
SOS	Somalia, Shilling
SRD	Suriname, Dollar
STD	Sao Tome And Principe, Dobra
SYP	Syria, Pound
SZL	Swaziland, Lilangeni
THB	Thailand, Baht
TJS	Tajikistan, Somoni
TMT	Turkmenistan, Manat
TND	Tunisia, Dinar
TOP	Tonga, Pa'anga
TRL	Turkey, Lira
TRY	Turkey, Lira
TTD	Trinidad And Tobago, Dollar
TWD	Taiwan, Dollar
TZS	Tanzania, Shilling
UAH	Ukraine, Hryvnia
UGX	Uganda, Shilling
UYU	Uruguay, Peso
UZS	Uzbekistan, Som
VEF	Venezuela, Bolivar Fuerte
VND	Vietnam, Dong

Currency Code	Country and Currency
VUV	Vanuatu, Vatu
WST	Samoa, Tala
XAF	Cameroon, Central African Republic, Republic of the Congo, Chad, Equatorial Guinea, and Gabon - CFA Franc BEAC
XCD	Anguilla, Antigua and Barbuda, Dominica, Grenada, Montserrat, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines - East Caribbean Dollar
XPF	French Polynesia, New Caledonia, Wallis and Futuna - CFP Franc
YER	Yemen, Rial
ZAR	South Africa, Rand
ZMK	Zambia, Kwacha
ZWL	Zimbabwe, Dollar

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.

19-21, Nihonbashi-Hakozakicho, Chuo-ku

Tokyo 103-8510, 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.

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 ficticious 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 2014. Portions of this code are derived from IBM Corp. Sample Programs. © Copyright IBM Corp. 2014.

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" at http://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.

Microsoft, Windows, Windows NT, and the Windows logo are trademarks of Microsoft Corporation in the United States, other countries, or both.

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.

Index

A

Add/Copy Row field   122, 130, 164
Address Line 1 field   119, 127
Address Line 2 field   119, 127
Amount field   26, 122, 131
Application field   135, 136

B

Buyer ID field   119, 128
Buyer Tax ID field   118, 126

C

cancel a shipment   115
Carrier Account # field   142
Carrier Service Code field   127
Category field   122, 130, 131
Charge Name field   122, 131
chargeback   154
City field   119, 127, 128
Community field   118, 127
Company field   119, 127
container
    view details   77
Contract # field   53
Country field   119, 128
Customer field   118, 127, 164

D

dashboard   1
Dashboard Panel field   9

F

First Name field   119, 127, 128
Footer Message field   142

H

Header Charge   119
Header Message field   142

I

Introduction
    dashboard   1
    setup   2
Invoice # field   26, 118, 126
Invoice Date field   118, 126
Invoice Type field   118, 126
Invoiced Qty. field   120
Item Description field   163, 164
Item field   120
Item ID field   163, 164

L

Last Name field   119, 127, 128
Line Identifier field   120
Line Total field   121

M

Maximum Number of Records to Show
    field   10, 12

N

Non-Compliance Summary   158
Number of Days to Look Ahead field   10

O

Order # field   118
Order Date field   118
Ordered Qty. field   120
Orders opened within the last days
    field   12

P

Payment Date field   26
Payment Ref # field   26
Payment Reference # field   26
Pro # field   127

Q

Qty. in Invoice field   120

R

Reason Code field   122, 131
Recalculate Total field   122, 131
Release # field   118, 127
Remove Lines field   119, 128
Routing field   127

S

SCAC field   127
shipment
    send shipment for route
        planning   175
Shipment # field   127
Shipment Address field   127
Shipment On field   127
Shipped Qty. field   120
State field   119, 127, 128
Supplier ID field   119, 127
Supplier Tax ID field   118, 127

T

Tax Exempt field   118, 126
Tax Jurisdiction field   122, 131
Tax Name field   122, 130
Total Supplier Charges field   122, 131,
    139
Transportation Method field   127
Type field   26

U

Unit Price field   120
UOM field   120

V

Vendor Compliance   153

Z

ZIP field   119, 128

IBM ®

Product Number: 5725-E38