



Sterling Store Inventory Management: User Guide

Fix Pack 9.1.0.1



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Intended Audience

This manual is intended to provide assistance to store associates who are using the IBM® Sterling Store Inventory Management to perform inventory tasks in a store.

Structure

This manual contains the following sections:

Chapter 1, "Navigation"

This chapter describes the layout of the Sterling Store Inventory Management user interface.

Chapter 2, "Performing Inventory Tasks"

This chapter describes the tasks that a store associate is required to perform to efficiently manage inventory in a store.

Chapter 3, "Performing Receiving Tasks"

This chapter describes the tasks that a store associate is required to perform to efficiently receive inventory in a store.

Chapter 4, "Managing Users"

This chapter describes how a store associate can manage users in a store.

Chapter 5, "Performing Outbound Tasks"

This chapter describes the outbound tasks that a store associate may be required to perform frequently.

Chapter 6, "Managing Alerts"

This chapter describes the alert management tasks that a store associate can perform using the Sterling Store Inventory Management.

Chapter 7, "Prints"

This chapter describes the various documents that are printed daily in a store.

Documentation

For more information about the Sterling Store Inventory Management components, see the following manuals:

- *Sterling Store Inventory Management: Release Notes*
- *Sterling Selling and Fulfillment Suite: Applications Installation Guide*
- *Sterling Store Inventory Management: Deployment Guide*
- *Sterling Selling and Fulfillment Suite: Applications Reference Implementation Guide*
- *Sterling Store Inventory Management: Concepts*
- *Sterling Store Inventory Management: Implementation Guide*
- *Sterling Store Inventory Management: User Guide*
- *Sterling Store Inventory Management: Localization Guide*
- *Sterling Store Inventory Management: Javadocs*

For more information about the IBM® Sterling Selling and Fulfillment Foundation components, see the following manuals:

- *Sterling Selling and Fulfillment Foundation: Release Notes*
- *Sterling Selling and Fulfillment Foundation: Installation Guide*
- *Sterling Selling and Fulfillment Foundation: Upgrade Guide*
- *Sterling Selling and Fulfillment Foundation: Configuration Deployment Tool Guide*

- *Sterling Selling and Fulfillment Foundation: Performance Management Guide*
- *Sterling Selling and Fulfillment Foundation: High Availability Guide*
- *Sterling Selling and Fulfillment Foundation: System Management Guide*
- *Sterling Selling and Fulfillment Foundation: Localization Guide*
- *Sterling Selling and Fulfillment Foundation: Customization Basics Guide*
- *Sterling Selling and Fulfillment Foundation: Customizing APIs Guide*
- *Sterling Selling and Fulfillment Foundation: Customizing Console JSP Interface for End User Guide*
- *Sterling Selling and Fulfillment Foundation: Customizing the RCP Interface Guide*
- *Sterling Selling and Fulfillment Foundation: Customizing User Interfaces for Mobile Devices Guide*
- *Sterling Selling and Fulfillment Foundation: Customizing Web UI Framework Guide*
- *Sterling Selling and Fulfillment Foundation: Customizing Swing Interface Guide*
- *Sterling Selling and Fulfillment Foundation: Extending the Condition Builder Guide*
- *Sterling Selling and Fulfillment Foundation: Extending the Database Guide*
- *Sterling Selling and Fulfillment Foundation: Extending Transactions Guide*
- *Sterling Selling and Fulfillment Foundation: Using Sterling RCP Extensibility Tool Guide*
- *Sterling Selling and Fulfillment Foundation: Integration Guide*
- *Sterling Selling and Fulfillment Foundation: Product Concepts Guide*
- *Sterling Warehouse Management System: Concepts Guide*
- *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*

- *Sterling Distributed Order Management: Configuration Guide*
- *Sterling Supply Collaboration: Configuration Guide*
- *Sterling Global Inventory Visibility: Configuration Guide*
- *Catalog Management: Configuration Guide*
- *Sterling Logistics Management: Configuration Guide*
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- *Sterling Reverse Logistics: User Guide*
- *Sterling Warehouse Management System: User Guide*
- *Sterling Selling and Fulfillment Foundation: Mobile Application User Guide*
- *Sterling Selling and Fulfillment Foundation: Business Intelligence Operational Reports Guide*
- *Sterling Selling and Fulfillment Foundation: Javadocs*
- *Sterling Selling and Fulfillment Suite: Glossary*
- *Parcel Carrier: Adapter Guide*
- *Sterling Selling and Fulfillment Foundation: Multitenant Enterprise Guide*
- *Sterling Selling and Fulfillment Foundation: Password Policy Management Guide*
- *Sterling Selling and Fulfillment Foundation: Properties Guide*
- *Catalog Management: Concepts Guide*
- *Sterling Selling and Fulfillment Foundation: Pricing Concepts Guide*

- *Sterling Selling and Fulfillment Foundation: Setting Up Quotes in Distributed Order Management*
- *Sterling Sensitive Data Capture Server, Release 1.0: Configuration Guide*
- *Sterling Sensitive Data Capture Server, Release 1.0: PA-DSS Implementation Guide*
- *Sterling Selling and Fulfillment Foundation: Secure Deployment Guide*
- *Sterling Business Center: Item Administration Guide*
- *Sterling Business Center: Pricing Administration Guide*
- *Sterling Business Center: Customization Guide*
- *Sterling Business Center: Localization Guide*
- *Sterling Field Sales: Deployment Guide*
- *Sterling Field Sales: Implementation Guide*
- *Sterling Field Sales: Localization Guide*
- *Sterling Field Sales: User Guide*
- *Sterling Field Sales: Customization Guide*
- *Visual Modeler: Administration Guide*
- *Visual Modeler: Best Practices Guide*
- *Visual Modeler: Implementation Guide*
- *Visual Modeler: Installation Guide*
- *Visual Modeler: Tutorial Guide*

For a description of the various documents in the Sterling Store Inventory Management documentation set, see the Sterling Store Inventory Management documentation home page at:

`<YFS_HOME>/documentation/SOP_doc_home.html`

where `<YFS_HOME>` is the `/Runtime` directory under the folder where this application and Sterling Selling and Fulfillment Foundation are installed.

Conventions

The following conventions may be used in this manual:

Convention	Meaning
. . .	An ellipsis represents information that has been omitted.
< >	Angle brackets indicate user-supplied input.
mono-spaced text	Mono-spaced text indicates a file name, directory path, attribute name, or an inline code example or command.
/ or \	Slashes and backslashes are file separators for Windows, UNIX and LINUX operating systems. The file separator for the Windows operating system is "\" and the file separator for Unix and Linux systems is "/". The Unix convention is used unless otherwise mentioned.
<INSTALL_DIR>	User-supplied location of the Sterling Multi-Channel Fulfillment Solution installation directory and Sterling Store Inventory Management installation directory. This is only applicable for Release 9.1

In order to get maximum benefit from the Sterling Store Inventory Management, it is important to understand the structure of the Sterling Store Inventory Management, and how it can best work to meet your business requirements.

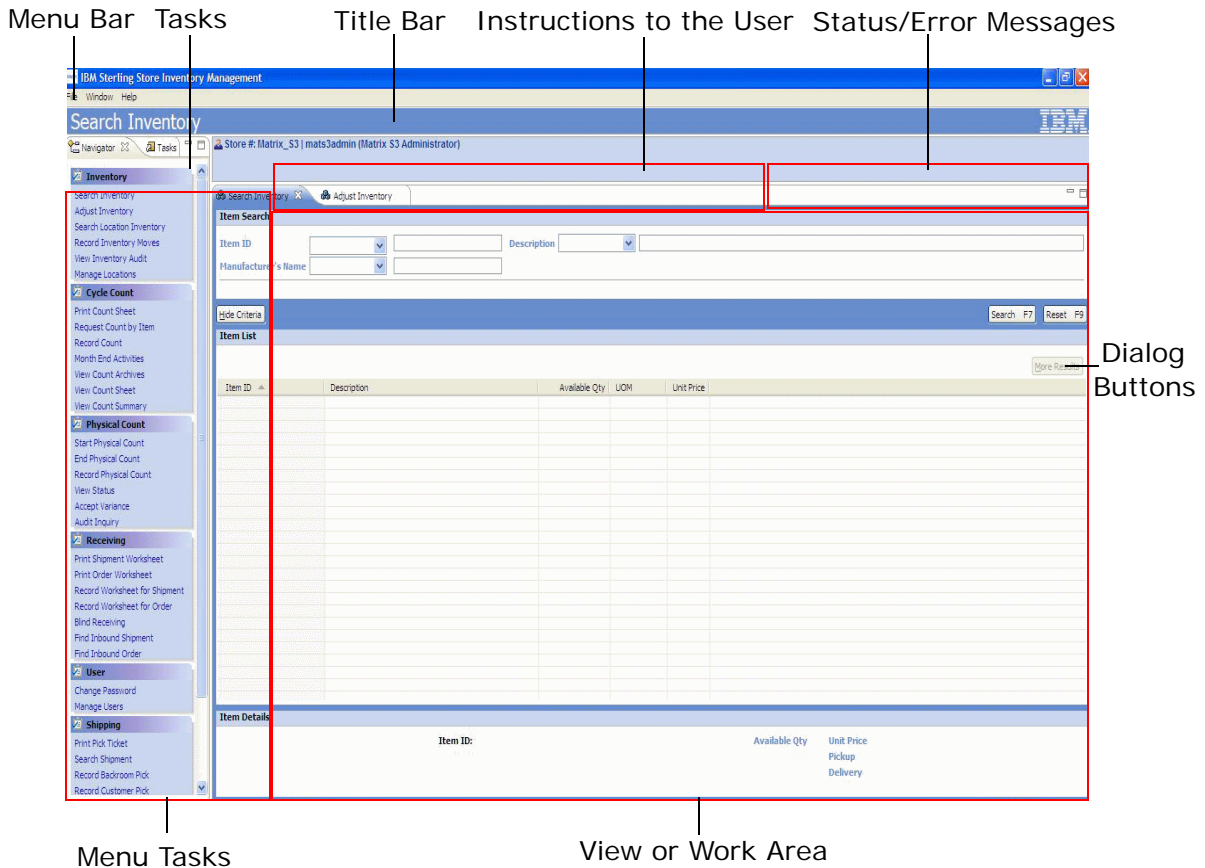
This chapter discusses the structure of the Sterling Store Inventory Management user interface and the various tasks that you can perform using the application.

1.1 IBM Sterling Store Inventory Management User Interface Layout

The Sterling Store Inventory Management provides a graphical user interface for navigation.

[Figure 1–1](#) illustrates the layout of the Sterling Store Inventory Management user interface.

Figure 1–1 Sterling Store Inventory Management Layout



1.1.1 Menu Bar

This bar contains the following menu options provided in the application:

- File — This provides the following options:
 - Home: Enables you to navigate to the application home page.
 - Logout: Click this to log out of the Sterling Store Inventory Management application.

- Exit: Click this to exit and close the Sterling Store Inventory Management application.
- Window — This provides the following options:
 - Navigator: Click this to navigate to the menu tasks of the Sterling Store Inventory Management application.
 - Tasks: Click this to navigate to the tasks related to the active task in the Sterling Store Inventory Management application.
- Help — Enables you to access the online help and get more information about the Sterling Store Inventory Management application.

1.1.2 Title Bar

This bar displays the currently active task.

1.1.3 Instructions to the User

This area displays the name of the user who has logged in to the application. It also displays appropriate instructions to assist the user in handling the store operations smoothly.

1.1.4 Status/Error Messages

This area displays the current status of the task that you are performing. It also displays error messages, if any. For example, when you add a shipment to the load, the message "Shipment is added to load" displays.

1.1.5 Menu Tasks

The Menu Tasks enable you to access all tasks easily. The menu items are arranged vertically in the left panel of the application.

1.1.6 Dialog Buttons

[Table 1–1](#) describes the commonly used dialog buttons in the Sterling Store Inventory Management.

Table 1–1 Dialog Buttons

Button	Function
Search	Initiates a search for items, count sheets, orders, and so forth, based on the criteria you enter.
Back to search	Displays the Search screen.
Next	Displays the next screen.
View Details	Displays the details of the selected item or shipment.
Previous	Displays the previously viewed screen.
Proceed	Displays the next screen.
Confirm	Confirms and saves the changes on the screen.
Hide Criteria	Hides the search criteria.
Reset	Clears information on the screen.

1.1.7 View or Work Area

You can perform tasks or view details related to the task in the work or view area.

1.2 Utilizing the Keyboard

The Sterling Store Inventory Management provides keyboard shortcuts and hot keys to help you work efficiently. Some of these keys are available only during certain processes or operations. To view a list of hot keys and keyboard shortcuts that the Sterling Store Inventory Management supports, press Ctrl+Shift+L in any screen.

Note: If you want to traverse out of a text box in any screen, press CTRL+TAB.

1.3 Supported Resolution

The Sterling Store Inventory Management supports resolution of 1024 X 768 pixels.

1.4 Logging Out of the IBM Sterling Store Inventory Management

To log out of the Sterling Store Inventory Management, perform either of the following actions:

- In the Menu Bar, select File > Log Out. The Login pop-up window displays, which enables you to log back into the application if necessary or close the window to exit and close the application.
- In the Menu Bar, select File > Exit to exit the application.

2

Performing Inventory Tasks

The Sterling Store Inventory Management enables a store associate to efficiently manage the inventory execution process in a store.

Operations in a store are broken into different tasks such as receiving, picking, and shipping of inventory. The Sterling Store Inventory Management provides comprehensive functionality to track, monitor, and maintain inventory in a store.

The Sterling Store Inventory Management provides:

- Comprehensive visibility to inventory in any location
- Ability to adjust inventory at any location

This chapter explains the various inventory tasks, and how you can perform them.

2.1 Searching for Inventory

This section explains how to search for items and view item details based on the entered search criteria.

To search for an item:

1. From Menu Tasks, select Inventory > Search Inventory. The Inventory Search screen displays.
2. In the Item
3. ID field, you can either enter the complete identifier of the item or a part of the item.
4. In the Description field, you can either enter the complete description or part of the item description.

5. In the Manufacturer's Name field, enter the complete name of the manufacturer.
6. In the Type field, select the item type from the drop-down list. Additional search criteria displays depending on the selected item type.
7. Click Search.

In the Item List panel, you can view details about the item such as the identifier for the item, description, available quantity, unit of measure, and unit price of the item.

In the Preview panel, you can view details for the selected item such as a image of the item, identifier for an item, description, available quantity, unit price, and also whether or not pickup and delivery is allowed for the item.

Click on the Item ID hyperlink to view more details of the item. For more information about viewing the item details, see [Section 2.1.1, "Viewing the Item Details"](#).

8. Do any of the following:
 - Click Show Criteria. The Item Search panel displays. If you want to modify the search criteria, repeat [Step 2](#) through [Step 7](#).
 - Click View Details to view more information about the selected item. For more information about viewing the item details, see [Section 2.1.1, "Viewing the Item Details"](#).
 - Click More Results to view more records. You can view a maximum of 200 records. By default, the system displays only 30 records.

2.1.1 Viewing the Item Details

You can view more details for the selected item and the image of the item.

- In the Item Details panel, you can view the identifier for an item, organization code, unit of measure, description, and unit price.
- In the Important Attributes panel, you can view the key attributes of the item.

- In the Location Inventory panel, you can view the location where the item is located, on-hand quantity, and unit of measure.
- In the Promotions panel, you can view the short and long descriptions of the item.
- In the Available To Promise panel:
 - You can view the currently available quantity of the item, and the item unit of measure.
 - In Availability Horizon Lead Days field, enter the number of days for which you want to view the availability. Click Go.
 - You can view the date range within which the inventory is available in the store, the quantity you can supply, the demand quantity, the available quantity, and shortage, if any.
- Do any of the following:
 - Click More details. The More Details Of Selected Item pop-up window displays. For more information about viewing the accessories of an item, kit details, and so forth, see [Section 2.1.1.1, "Viewing More Details of a Selected Item"](#).
 - Click Back to Search. The Item List panel of the Inventory Search screen displays. For more information about searching for inventory, see [Section 2.1, "Searching for Inventory"](#).

2.1.1.1 Viewing More Details of a Selected Item

You can view more details of an item such as the accessories of an item, kit components, specifications, items for upsell, and items for substitution.


- To view the accessories of an item, click the Accessories tab. You can view the identifier for the item, description, associated quantity, and the unit price of all accessories associated with that item.
- To view the kit details, click the Kit Details tab. You can view the identifier for an item, description, and the kit quantity.
- To view the specifications of an item, click the Specifications tab.
- To view the items for upsell, click the Up Sells tab. You can view the identifier for an item, description, available quantity, and the unit price of all items available for upsell.

- To view the items for substitution, click the Substitutions tab. You can view the identifier for the item, description, available quantity, and the unit price of all items available for substitution.


2.2 Performing Inventory Adjustments

It may be necessary to adjust inventory from time-to-time. For example, adjustments are made when the system quantity does not match the actual physical quantity.

To adjust inventory:

1. From Menu Tasks, select Inventory > Adjust Inventory. The Adjust Inventory screen displays.
2. In the Reason Notes panel, enter appropriate notes for performing adjustments, if applicable.
3. In the Item ID field, enter the identifier of the item that you want to adjust. Click  to search for an item. The description of the item automatically displays.

For more information about searching inventory, see [Section 2.1, "Searching for Inventory"](#).

4. In the Location field, enter the location where you want to perform the adjustment. Click  to search for a location. For more information about searching locations, see [Section 2.2.1, "Searching for a Location"](#).

The item quantity that is currently available in the location and the UOM of the item, automatically displays.

Note: If the store has only one location, the Sterling Store Inventory Management displays the location in the Location field.

5. In the Reason field, select the appropriate adjustment reason from the drop-down list.
6. In the Operation field, select the adjustment operation. The valid values are Increase and Decrease.

Note: The adjustment operation that displays depends on the adjustment reason you select. For example, if you select the reason as Found-New only the increase operation displays in the drop-down list.

7. In the Adjust Qty field, enter the number of units of the item you want to adjust.
8. In the UOM field, select the unit of measure of the item from the drop-down list.

The system calculates and automatically displays the final quantity and UOM.
9. To adjust additional items, repeat [Step 3](#) through [Step 8](#).
10. Click Confirm.

2.2.1 Searching for a Location

To search for a location:


1. In the Location ID field, enter the complete identifier of the location or a part of the location.
2. Click Search. The search results display in the Search Result panel.
3. From the list, select the appropriate identifier of the location.
4. Click Proceed.

2.3 Recording Inventory Movement


You can move inventory from one location to another in a store, and record the inventory movement.

To move inventory from a location:


1. From Menu Tasks, select Inventory > Record Inventory Moves. The Record Inventory Moves screen displays.
2. In the Item ID field, enter the identifier of the item that you want to move. The description of the item automatically displays.

Click  to search for an item. For more information about searching inventory, see [Section 2.1, "Searching for Inventory"](#).

3. In the From Location field, enter the source location from where you want to move the item. The item quantity that is currently available in the location, and the UOM automatically display.

Click  to search for a location. For more information about searching locations, see [Section 2.2.1, "Searching for a Location"](#).

4. In the Move Qty field, enter the quantity of item you want to move.
5. In the UOM field, select the unit of measure of the item.
6. In the To Location field, enter the target location where you want to move the item.



Click  to search for a location. For more information about searching locations, see [Section 2.2.1, "Searching for a Location"](#).




7. Repeat [Step 2](#) through [Step 6](#) to move additional items from the source location to the target location.
8. Click Confirm.

2.4 Viewing Inventory Audits

Whenever you make inventory modifications, the system creates an inventory audit record for all inventory changes that occur in a store.

To view inventory audits:


1. From Menu Tasks, select Inventory > View Inventory Audit. The Inventory Audit screen displays.
2. In the Find Audit Information panel:
 - a. In the From field, enter the start date from when you want to view the audit information.
Click  to select the date from the calendar.
 - b. In the To field, enter the end date up to when you want to view the audit information.
Click  to select the date from the calendar.

- c. In the Item ID field, enter the identifier of the item for which you want to view the audit information. The description of the item automatically displays.
Click  to search for an item. For more information about searching for inventory, see [Section 2.1, "Searching for Inventory"](#).
- d. In the Location field, enter the location where the item is located.
Click  to search for a location. For more information about searching locations, see [Section 2.2.1, "Searching for a Location"](#).
- e. In the Modification Type field, select the appropriate modification type from the drop-down list.
- f. In the Reason field, select the appropriate modification reason from the drop-down list.
- g. In the Performed By field, enter the identifier of the user who performed modifications.
Click  to search for a user. For more information about searching for users, see [Section 4.2, "Managing Users"](#).
- h. Click Search. The audit information for the selected date range displays.
Click More Results to view more records. You can view a maximum of 200 records. By default, the system displays only 30 records.
 - In the Audit List panel, you can view the date on which the item was modified, identifier of the item, location where the item was modified, modification type, modification reason, quantity adjusted, unit of measure of the item, and the user who performed modifications.
 - In the Audit Details panel, based on the item selected and the modification type associated with the item, appropriate audit information displays. For example, if you have received inventory in a store, the receipt details such as the BOL number, shipment number, and so forth displays.
 - Click Show Criteria. The Find Audit Information panel displays. If you want modify the search criteria, repeat [Step a](#) through [Step h](#).

2.5 Managing Store Locations

A store manager can use Manage Locations to search for a particular location in a store. All the locations created are regular locations. The Sterling Store Inventory Management also allows the store manager to add or delete a store.

From Menu Tasks, select Inventory > Manage Locations. The Manage Locations screen displays.

In the Manage Locations screen, select the location and click  to delete location. You can add another location, once you leave the current location.

Note: Before deleting a location, ensure that the location is empty.

2.6 Performing Cycle Count

You can perform count on regular or ad hoc basis to validate the accuracy of the item inventory. You can count an item or item categories.

2.6.1 Printing Count Sheets

You can either print or reprint a count sheet to view items that are pending count.

2.6.1.1 Printing a Count Sheet

To print a count sheet:

1. From Menu Tasks, select Cycle Count > Print Count Sheet. The Print Count Sheet screen displays.
2. In the Count Sheet Print Options panel, under, You have... item(s) for which count sheet is not yet printed, choose any of the following options:
 - Choose Print One count sheet with all items to print a count sheet that lists all items that are pending count.
 - Choose Print one count sheet with any... items, and specify the actual number of items that you want to put on count. The printed count sheet lists the specified number of items that are pending

count. For example, if there are 5 items that are pending count, and you want to count only 3 items, the first three items are put on count.

- Choose specific items, and click Next. The Count Request List screen displays. For more information about selecting items, see [Section 2.6.1.1.1, "Viewing the Count Request List"](#).

3. Click Print.

2.6.1.1.1 Viewing the Count Request List

You can view details such as the identifier of the item, description, number of orders, number of locations, and due date.

To print a count sheet:

1. Do any of the following:
 - Check the Select All box to put all items on count.
 - Check the boxes of the required items to put only the selected items on count.
2. Click Print.

2.6.1.2 Reprinting a Count Sheet

You may want to reprint a count sheet to perform count.

To reprint a count sheet:

1. From Menu Tasks, select Cycle Count > Print Count Sheet. The Print Count Sheet screen displays.
2. In the Count Sheet Print Options panel, under, You have... count sheets pending count entry, choose any of the following options:
 - Choose Reprint Count Sheet #, and enter the count sheet number that you want to reprint.
 - Choose specific count sheets to reprint, and click Next. The Count Sheet List screen displays. For more information about reprinting count sheets, see [Section 2.6.1.2.1, "Viewing the Count Sheet List"](#).
3. Click Print.

2.6.1.2.1 Viewing the Count Sheet List

You can view details such as the count sheet number, count sheet creation date, and the user who created the count sheet. From the list, select the count sheet number that you want to reprint.


2.6.2 Generating Ad Hoc Count Requests

You can generate ad hoc count requests for an item.

To generate ad hoc count request:

1. From Menu Tasks, select Cycle Count > Request Count By Item. The Request Count By Item screen displays.
2. In the Item ID field, enter the identifier of the item.

A brief description of the item and the date on which the item was last counted automatically displays.

Click  to search for an item. For more information about searching inventory, see [Section 2.1, "Searching for Inventory"](#).

3. Click Save to save the list of items added to the count sheet.
4. Click Print. The count sheet is printed.

Note: If the item you entered is already put on count, the error message "Item already put on count" displays.

2.6.3 Recording Count Results

After counting all items, you can record the count result for each item in the count worksheet.

To record count results:

1. From Menu Tasks, select Cycle Count > Record Count. The Record Count screen displays.
2. In the Count Sheet # field, enter the count sheet number and click Search.

In the Enter Count Results panel, the identifier for the item, description of the item, location where the item is located, on hand item quantity, and mismatch found, if any, automatically displays.

The mismatch quantity is computed as the difference between the quantity from the time of printing the count sheet to the time of recording count results. When a mismatch is found for an item, the system raises an alert. To determine why the mismatch occurred, see the inventory audit for the item. For more information about inventory audits, see [Section 2.4, "Viewing Inventory Audits"](#).

3. In the Count Qty field, enter the item quantity that you counted.
4. In the UOM field, the UOM of the item automatically displays. Select the UOM from the drop-down list, if applicable.

If variances are found, the system computes the difference between the count quantity and onhand quantity, and displays the variance quantity.

5. In the Count Qty field, enter the alternate item quantity that you counted.

Note: In the Sterling Store Inventory Management, the blank field indicates that you need to enter the quantity based on the alternate UOM displayed.

6. In the UOM field, the alternate UOM of the item automatically displays. Select the alternate UOM of the item from the drop-down list, if applicable.

Note: You can enter only two alternate UOMs.

7. In the Exclude field, check the box to exclude items from count. For example, if you have a count sheet with 10 items, and if you can count only 8 items, you can exclude the remaining 2 items from count.

You can exclude items from count only at the item level and not at a location level.

8. If you find any item in a new location:
 - a. In the Item ID field, enter the identifier of the item.
 - b. In the Location field, enter the location where the item is present.

The on-hand item quantity automatically displays.

- c. In the Count Qty field, enter the item quantity that you counted.
- d. In the UOM field, the UOM of the item automatically displays. Select the UOM of the item from the drop-down list, if applicable.
If variances are found, the system computes the difference between the count quantity and on hand quantity and displays the variance quantity.
- e. In the Count Qty field, enter the alternate item quantity that you counted.

Note: In the Sterling Store Inventory Management, the blank field indicates that you need to enter the quantity based on the alternate UOM displayed.

- f. In the UOM field, the alternate UOM of the item automatically displays. Select the alternate UOM of the item from the drop-down list, if applicable.
 - g. In the Inventory Audit field, click the Inventory Audit hyperlink. You can view the audit details for the item. For more information about the audit details, see [Section 2.4, "Viewing Inventory Audits"](#).
9. Click Confirm.

2.6.4 Cancelling Pending Counts

At the end of every month, you can cancel all counts that are pending.



To cancel pending counts:

1. From Menu Tasks, select Cycle Count > Month End Activities. The Month End Activities screen displays.
2. Click Cancel All Pending Counts. All counts that are pending for that particular month are cancelled.

2.6.5 Viewing Count Archive Details for Multiple Count Sheets

You can view count archive information present in one or more count sheets that are closed or cancelled.

To view count archive details:

1. From Menu Tasks, select Cycle Count > View Count Archives. The View Count Archives screen displays.
2. In the Search Counts panel:
 - a. In the Created Between field, enter the start date.
Click  to select the date from the calendar.
 - b. In the And field, enter the end date.
Click  to select the date from the calendar.
 - c. In the Containing Item ID field, enter the identifier of the item, if applicable.
 - d. If you want to view count archives for count sheets that are closed, choose Closed.
By default, this option is always selected.
 - e. If you want to view count archives for count sheets that are cancelled, choose Cancelled.
 - f. If you want to view count archives for both cancelled and closed count sheets, Choose Both.
 - g. Click Search.

In the Count List panel you can view the identifier of the item, count sheet number, date on which the count was created, current status of the count, date on which the count was closed or cancelled, and the user who closed or cancelled the count sheet.

If variances are found for the selected item, in the Variance Details panel, you can view the description of the item, variance quantity, and the cost applied to the variance.

2.6.6 Viewing Details for a Count Sheet

You can view count sheet information for a particular count sheet.

To view count sheet details:

1. From Menu Tasks, select Cycle Count > View Count Sheet. The View Count Sheet screen displays.
2. In the Count Sheet # field, enter the count sheet number and click Search.

In the Count Sheet Details panel, you can view the user who reported the count, total variance cost, and the absolute variance cost.

The total variance cost is computed as the $VARIANCE_QUANTITY * UNIT_COST$, where the variance quantity is for the inventory UOM.

You can also view the identifier of the item, item description, location where the count was performed, item quantity, UOM, variance quantity, variance item UOM, and the variance cost.

2.6.7 Viewing Count Summary

You can view a summary of all count tasks performed on the current day.

To view the count summary:

1. From Menu Tasks, select Cycle Count > View Count Summary. The View Count Summary screen displays.

In the Count Summary panel, you can view counts that were manually assigned, system generated counts, counts that are pending, total counts that are pending count, counts that are completed, counts that are cancelled, overall counts that are pending, net variance, absolute variance, and the total number of items with a variance.
2. If you want to print a variance report, click Print Variance Report.
3. If you want to view variances that are found, click View Variance. The View Count Variance screen displays. For more information about viewing variances, see [Section 2.6.7.1, "Viewing Variances"](#).

2.6.7.1 Viewing Variances

You can view count variances found on the current day. You can also request for a recount, if necessary.

In the Today's Count Variance panel, you can view the total variance cost and absolute variance cost. You can also view the identifier of the item,

description, location where the item is located, variance quantity, UOM, variance cost, and user name who reported the variance.

If you want to recount items, check the boxes for the items that you want to recount and click Recount.

2.7 Performing Physical Counts

Physical counts are done to synchronize the physical and system inventory pictures and are required as part of the corporate policy or client requirements. During Physical Count process, the store is closed and no other activity is performed. All inventory in the store is physically counted.

2.7.1 Starting a Physical Count Process

Before starting the physical count process in a store, you need to initiate the physical count process in the system.

To start the physical count process:

1. From Menu Tasks, select Physical Count > Start Physical Count. The Start Physical Count screen displays.
2. In the Start Count Sheet # field, enter the first count sheet number that you want to use during counting.
3. In the End Count Sheet # field, enter the last count sheet number where you want to end count.
4. Click Start Physical Count. A confirmation pop-up window displays.
5. Click OK. For the entered count sheet number range, the physical count process starts.

2.7.2 Ending the Physical Count Process

Once all variances have been accepted, you can end a physical count.

To end a physical count process, from Menu Tasks, select Physical Count > End Physical Count. The End Physical Count screen displays.

Click End Physical Count to complete the physical count. A confirmation pop-up window displays. Click OK to end the physical count process.

2.7.3 Recording Physical Count Details

After counting all items, you can record the details of the physical count process.

To record the physical count details:

1. From Menu Tasks, select Physical Count > Record Physical Count. The Record Physical Count screen displays.
2. In the Count Sheet # field, enter the count sheet number of the physical count for which you want to record the count details.
3. In the Sequence # field, the sequence number displays.
4. In the Location ID field, enter the location identifier of the location where the count is performed.
5. In the Item ID field, enter the item identifier of the item.
In the Description field, the item description displays.
6. In the Count Qty field, enter the quantity of item that you physically counted.
7. The UOM field automatically populates.
8. In the Count Qty field, enter the quantity of the alternate item that you physically counted.

Note: In the Sterling Store Inventory Management, the blank field indicates that you need to enter the quantity based on the alternate UOM displayed.

9. The alternate UOM field automatically populates.
10. In the Total field, the total count quantity displays.
11. Click Confirm to create the count sheet.

Note: To delete a single record, click the Delete icon present at the beginning of each record.

12. If you want to clear all the data in the count sheet, click Clear Sheet Data.

Note: In Release 7.1 HF13 and higher, the Sterling Store Inventory Management application provides the ability for a user to add items in any order when recording physical count activities.:

2.7.4 Viewing Physical Count Status

You can view the status of the ongoing physical count.

From Menu Tasks, select Physical Count > View Status. The Physical Count Status screen displays.

You can view the range of count sheet numbers that are entered and also the count sheet numbers that have not been entered.

Note: If records do not exist for more than five consecutive count sheets, then the range of count sheet numbers is displayed.

If you want to view variances for all items counted as part of the physical count process, click View Variance. For more information about viewing variances, see [Section 2.7.4.1, "Viewing Variances"](#).

If you want to rectify the count entry for items counted as part of the physical count process, click Rectify Count. For more information about rectifying the count sheet, see [Section 2.7.4.2.1, "Rectifying Count Sheet"](#).

2.7.4.1 Viewing Variances

You can view variances for all items counted as part of the physical count process either when accepting a variance or during an audit inquiry.

To view variances found during the physical count process:

- To view all new items that were found during the physical count, choose "Show all newly found items". Click Search. In the Newly found items panel, you can view the item identifier, item description, count quantity, unit of measure for the item, and cost of the variance.
- To view all items with variance, choose "Show items with variance" and enter the following parameters:

- In the Item ID Containing field, enter the identifier of the item. You can also enter just a part of the identifier of the item. For example, if you are searching for a keyboard, you can just type "key". A list of items starting with letters "key" displays.
- Select net variance or absolute variance from the drop-down list.
- Select the variance from the drop-down list. The valid values are Cost and Percentage.

You can also view variances for a given range. For example, if you select the variance value as "Percentage", enter the range between 10% and 20%, and click Search, you can view a list of items for which variances are found for the specified range.

- Click Search.

In the Items with Variance panel, you can view a list of items with variances such as the identifier of the item, description, on hand quantity, count quantity, unit of measure for the item, variance quantity, net variance, absolute variance, absolute variance percentage, and net variance percentage.

If you want to view variances found for an item at the location level, click View Location level variance. For more information about viewing variances found for an item at the location level, see [Section 2.7.4.1.1, "Viewing Location Level Variances"](#).

If you want to rectify the count entry for a count sheet, click Rectify Count. For more information about rectifying a count sheet, see [Section 2.7.4.1.2, "Viewing Variance Details for an Item"](#).

2.7.4.1.1 Viewing Location Level Variances

You can view the identifier of the item, description, location of the item, on hand quantity, count quantity, unit of measure for the item, variance quantity, net variance, and net variance percentage.

If you want to rectify the count entry for items in a particular location, click Rectify Count. For more information about rectifying the count sheet, see [Section 2.7.4.1.2, "Viewing Variance Details for an Item"](#).

2.7.4.1.2 Viewing Variance Details for an Item

You can view the item identifier, item description, system quantity, quantity after physical count, variance quantity, and variance value for a particular item.

In the Variance at each Location panel, you can view the identifier for the location, system quantity, count quantity, variance quantity, and variance value.

You can also view a table comprising of count sheet number, count sheet line number, the quantity of items counted, unit of measure for the item, and the user name of the person who performed the count for the locations where the count quantity has been recorded. Select the line number for which you want to rectify the count and click Rectify Count sheet. For more information about rectifying count sheet, see [Section 2.7.4.2.1, "Rectifying Count Sheet"](#).

Click Print to print the variance details.

2.7.4.2 Searching for a Count Sheet

You can search for a particular count sheet or for all count sheets that are part of the physical count.

To search for a count sheet:

1. In the Count Sheet # field, enter the count sheet number and click Search.

If you do not enter the count sheet number and click Search, all the count sheets for that physical count are displayed.

In the View count sheets panel, you can view the count sheet number, user identifier of the user who recorded the count, and recorded date of count sheet.

2. Select the count sheet number of the count sheet you want to rectify and click Proceed. The Rectify Physical Count screen displays. For more information about rectifying physical count, see [Section 2.7.4.2.1, "Rectifying Count Sheet"](#).

2.7.4.2.1 Rectifying Count Sheet

To rectify the physical count entry for a count sheet:

1. In the Count Sheet # field, the count sheet number displays.

In the Modify count quantity panel, the sequence number, location identifier, the identifier of the item, and description of the item displays.

2. In the Count Qty field, enter the new item quantity, if applicable.
3. In the Count Qty field, enter the alternate item quantity that you counted.

Note: In the Sterling Store Inventory Management, the blank field indicates that you need to enter the quantity based on the alternate UOM displayed.

4. In the Add New Items to Count Sheet panel,
 - a. In the Sequence # field, the sequence number of the item displays.
 - b. In the Location ID field, the location identifier displays.
 - c. In the Item ID field, the item identifier displays.
 - d. In the Description field, the item description displays.
 - e. In the Count Qty field, enter the new item quantity, if applicable.
 - f. In the Count Qty field, enter the alternate item quantity that you counted.

Note: In the Sterling Store Inventory Management, the blank field indicates that you need to enter the quantity based on the alternate UOM displayed.

5. Click Confirm to record the rectified count quantity.
6. If you want to cancel the count sheet, click Void Count Sheet..

Note: To delete a single record, click the Delete icon present at the beginning of each record.

7. If you want to clear all the data in the count sheet, click Clear Sheet Data.

Note: In Release 7.1 HF13 and higher, when rectifying a count sheet, the Sterling Store Inventory Management provides the ability for a user to modify values in the Item ID or Location ID fields of a count line without the need to delete and recreate the count line. Additionally, the Sterling Store Inventory Management provides the ability for a user to add items in any order when rectifying physical count activities.

2.7.5 Cancelling Physical Count

To cancel physical count, from Physical Count Tasks, select Cancel Physical Count. The Cancel Physical Count screen displays.

Select the appropriate cancellation reason code from the drop-down list and click Cancel Physical Count.

2.7.6 Accepting Variance

Once all the count sheets are recorded, you can accept the variances for the complete physical count.

From Menu Tasks, select Physical Count > Accept Variance. The Accept Variance screen displays.

You can view the total variance cost and the count sheet range assigned for the physical count. The total variance cost is a hyperlink. Click this to view the variance research screen. If you want to view all the items missing during count, choose Show all missing items. This option is available only when you navigate to this screen from Accept Variance. Click Search.

In the Missing items panel, you can view the item identifier, item description, on hand quantity, unit of measure for the item, and cost of the variance.

For more information about viewing variances, see [Section 2.7.4.1, "Viewing Variances"](#).

2.7.7 Audit Inquiry

You can view the audit details for the physical count performed.

Navigate to Physical Count > Audit Inquiry. The Audit Inquiry screen displays.

You can view the start and end date of the count, total number of count sheets, total cost variance, and the total percentage of accuracy.

The percentage of accuracy = (Total no of items that are 98% or more accurate / Total no of items) * 100

Click the Total number of count sheets hyperlink to view count sheet details. For more information about viewing count sheet details, see [Section 2.7.4.2, "Searching for a Count Sheet"](#).

Click the Total Variance hyperlink to view variance details. For more information about viewing variance details, see [Section 2.7.4.1, "Viewing Variances"](#).

From Audit Physical Count, select View Variance to view variances for the items counted as part of the physical count. For more information about viewing count sheet details, see [Section 2.7.4.2, "Searching for a Count Sheet"](#).

From Audit Physical Count, select View Count Sheets to view count sheet details. For more information about viewing count sheet details, see [Section 2.7.4.2, "Searching for a Count Sheet"](#).

Performing Receiving Tasks

The Sterling Store Inventory Management provides visibility to detailed information about inbound shipments for a store. The receiving process in the Sterling Store Inventory Management involves inventory received from other stores, distribution centers (DC), or vendors. Recording receipts in the Sterling Store Inventory Management is an offline process.

A receipt in the Sterling Store Inventory Management is usually made for an inbound order or shipment. The Sterling Store Inventory Management provides the ability to print a receiving worksheet for each shipment or for the order, if order does not have a shipment. If you do not have order or shipment information, the Sterling Store Inventory Management enables you to record receipt of the shipment as blind receipt.

3.1 Printing Receiving Worksheets for a Shipment

You can print the receiving worksheet for a shipment for a specific Bill Of Lading (BOL) number.

To print the receiving worksheet for a shipment:

1. From Menu Tasks, select Receiving > Print Shipment Worksheet. The Print Shipment Worksheet screen displays.
2. In the BOL # field, enter the BOL number for the expected shipment.





If you want to search for the expected shipments using the BOL number, click Search. The Search Shipment screen displays. For more information about searching for a shipment using BOL number as search criteria, see [Section 3.1.1, "Searching for Shipments Using the Bill of Lading Number"](#).


3. Click Print.
 - If the BOL contains a single shipment, the receiving worksheet is directly printed.
 - If the BOL contains multiple shipments, the Select Shipment screen displays. For more information about selecting a shipment from a BOL, see [Section 3.1.2, "Selecting Shipment for Bill Of Lading"](#).
 - If the BOL contains no shipments, an error message displays.

3.1.1 Searching for Shipments Using the Bill of Lading Number

You can search for a shipment by using the BOL number as search criteria.

To search for a shipment using the BOL, in the Search Shipment panel:

1. Under Search for:
 - Choose All Shipments to search for all shipments that are yet to be received.
By default, this option is always selected.
 - Choose Transfer from Store, if inventory is received from another store. Click  to select the store name. For more information about searching for a store, see [Section 4.2.3.1, "Searching for a Store"](#).
 - Choose Ship from Vendor, if inventory is received from a vendor. Click  to select the vendor. For more information about searching for a store vendor, see [Section 3.1.1.1, "Searching for a Vendor"](#).
 - Choose Transfer from DC, if inventory is received from a distribution center. Enter or select the DC from the drop-down list.
2. Under Expected Delivery Date:
 - Choose Till Date to view shipments that are expected to be received until this day. Click  to select the date.
 - Choose Between and enter the from and to date to view a list of shipments for the selected date range. Click  to select the date.

3. Under Containing Item ID enter the item identifier. Click  to search for an item. For more information about searching for inventory items, see [Section 2.1, "Searching for Inventory"](#).
4. Click Search. The Search Results panel displays with a list of the receiving shipments.
5. From the list, select the appropriate shipment.
6. Click Print to print the list of receiving shipments.

3.1.1.1 Searching for a Vendor

To search for a vendor:

1. In the Vendor ID field, enter the identifier of the vendor.
2. In the Seller Name field, enter the complete seller name or a part of the seller name, if applicable. This field is case-sensitive.
3. In the City field, enter the complete city name or a part of the city name, if applicable. This field is case-sensitive.
4. In the State field, enter the complete state name or a part of the state name, if applicable. This field is case-sensitive.

For example, if you enter the state as California, all stores available in California are listed in the Search Results panel.

5. In the Max Records field, enter the maximum number of records to be listed as a result of your search.
By default, the value of this field is 30.
6. Click Search. The search results display in the Search Results panel.
From the list, select the appropriate identifier of the vendor and click Proceed.

3.1.2 Selecting Shipment for Bill Of Lading

In the Select Shipment screen you can view the shipment details for a specific BOL number.

You can also view the shipment number, current status of the shipment, the expected date of delivery to the store, the origin of the shipment, and the carrier service used for shipping the shipment.

From the list, select the shipment for which you want to print the receiving worksheet and click Print.

3.2 Printing Receiving Worksheets for an Order

You can print the receiving worksheet for an order based on the specified order number.

To print the receiving worksheet for an order:

1. From Menu Tasks, select Receiving > Print Order Worksheet. The Print Order Worksheet screen displays.
2. In the Order # field, enter the order number for the expected shipment.

If you want to search for an order number, click Search. The Search Order screen displays. For more information about searching for an order number, see [Section 3.2.2, "Searching for an Order"](#).

3. Click Print.
 - If the order contains a single shipment, the receiving worksheet is directly printed.
 - If the order contains multiple shipments, the Select Shipment screen displays. From the list, select the shipment for which you want to print the receiving worksheet and click Print. For more information about selecting a shipment, see [Section 3.2.1, "Selecting Shipment for an Order"](#).
 - If the order does not contain a shipment, the receiving worksheet is printed for the order.
 - If more than one order exists for the same order number, the Select Order screen displays. From the list, select the order for which you want to print the receiving worksheet and repeat [Step 3](#).





3.2.1 Selecting Shipment for an Order

In the Select Shipment screen you can view the shipment details for the order number. You can also view the shipment number, current status of the shipment, the expected date of delivery to the store, origin of the shipment, and the carrier service used for shipping the shipment.

3.2.2 Searching for an Order

You can search for an order and its associated shipments.

To search for order, in the Search Order panel:

1. Under Search for:
 - Choose All Orders if you want to search for orders that are yet to be received.
By default, this option is always selected.
 - Choose Transfer from Store if inventory is received from another store. Click  to select the store name. For more information about searching for a vendor, see [Section 4.2.3.1, "Searching for a Store"](#).
 - Choose Ship from Vendor if inventory is received from a vendor. Click  to select the vendor. For more information about searching for a store, see [Section 3.1.1.1, "Searching for a Vendor"](#).
 - Choose Transfer from DC if inventory is received from a DC. Enter or select the DC from the drop-down list.
2. Under Requested Delivery Date:
 - Choose Till Date to view shipments that are expected to be received until this day.
 - Choose Between and enter the from and to dates to view a list of shipments for the specified date range. Click  to select date from the calendar.
3. Under Containing Item ID enter the identifier of the item. Click  to search for an item. For more information about searching for inventory, see [Section 2.1, "Searching for Inventory"](#).
4. Click Search. The Search Result table displays a list of inbound orders.
5. Select the order for which you want to print the worksheet.
6. Click Print.
 - If the order contains a single shipment, the receiving worksheet is directly printed.

- If the order contains multiple shipments, the Select Shipment screen displays. From the list, select the shipment for which you want to print the receiving worksheet and click Print. For more information about selecting a shipment, see [Section 3.2.1, "Selecting Shipment for an Order"](#).
- If the order does not contain a shipment, the receiving worksheet is printed for the order.
- If more than one order exists with the same order number, the Select Order screen displays. For more information about selecting a shipment, see [Section 3.2.2.1, "Selecting an Order"](#). From the list, select the order for which you want to print the receiving worksheet and repeat [Step 3](#).

3.2.2.1 Selecting an Order

In the Select Order panel, you can view the name of the seller, order date, requested date of delivery, and the carrier used for the shipment.

3.3 Recording Receiving Worksheet Details for a Shipment

You can record the receiving worksheet details for a shipment for the specified receipt BOL number.

To record the receiving worksheet details:

1. From Menu Tasks, select Receiving > Record Worksheet for Shipment. The Record Receipt screen for a shipment displays.
2. In the Record BOL # field, enter the BOL number of the shipment.
3. Click Proceed.
 - If the BOL contains a single shipment, the Record Receipt screen displays where you can record the receipt details. For more information about recording the shipment details, see [Section 3.3.1, "Recording Receipt Details for a Bill Of Lading"](#).
 - If the BOL contains multiple shipments, the Select Shipment screen displays. From the list, select the shipment and click Proceed. For more information about recording the shipment details, see [Section 3.3.1, "Recording Receipt Details for a Bill Of Lading"](#).

3.3.1 Recording Receipt Details for a Bill Of Lading

To record the receipt details:

In the Receipt Details panel, you can view the address from where the shipment is shipped, order date, BOL number, shipping date, shipment number, ETA, and carrier used for the shipment.

In the Pre-Assigned Orders panel, you can view the sales order number, identifier of the item, description of the item, and ordered quantity of the item.

1. In the Received Qty field, enter the quantity of items received.
In the UOM field, the unit of measure for the item displays.
2. In the Received field, enter the alternate quantity of items received, if applicable.
3. In the UOM field, select the alternate UOM of the item from the drop-down list.
4. In the Received field, enter the alternate quantity of items received.
5. In the UOM field, select the alternate UOM of the item from the drop-down list.

Note: You can enter only two alternate UOMs.

6. In the Damaged field, enter the item quantity that is damaged, if applicable. For example, if you receive 10 units and if 2 units are damaged, enter 8 units of received quantity and 2 units of damaged quantity.
By default, the damaged quantity displays.
7. In the UOM field, select the UOM from the drop-down list, if applicable.
8. In the Damaged field, enter the alternate quantity of items damaged.
9. In the UOM field, select the alternate UOM for the item from the drop-down list.

Note: If you check the Receive with no discrepancies box, the ordered quantities automatically display in the Pre-Assigned Orders panel.

10. In the Stock Replenishment Orders panel, you can view the sales order number, item identifier, description of the item, and ordered quantity of the item.
 - a. In the Received field, enter the quantity of items received.
 - b. In the UOM field, select the UOM of the item from the drop-down list, if applicable.
 - c. In the Received field, enter the alternate quantity of items received.
 - d. In the UOM field, select the alternate UOM of the item from the drop-down list.

Note: You can enter only two alternate UOMs.

- e. In the Damaged field, enter the item quantity that was damaged quantity, if applicable.

By default, the damaged quantity displays.
 - f. In the UOM field, select the UOM of the item from the drop-down list, if applicable.
 - g. In the Damaged field, enter the alternate quantity of items damaged.
 - h. In the UOM field, select the alternate UOM of the item from the drop-down list.

Note: If you check the Receive with no discrepancies box, the ordered quantities automatically display in the Stock Replenishment Orders panel.

11. You can enter additional items that are listed in the order and that are present in some other shipment of the same BOL.

In the Additional Items panel:

- a. In the Order # field, enter the order number.
- b. In the Item ID field, enter the identifier of the item.
A brief description of the item displays.
- c. In the Received field, enter the quantity of items received.
- d. In the UOM field, select the UOM of the item from the drop-down list, if applicable.
- e. In the Received field, enter the alternate quantity of items received.
- f. In the UOM field, select the alternate UOM of the item from the drop-down list.
- g. In the Damaged field, enter the quantity of the item that was damaged, if applicable.
By default, the damaged quantity displays.

12. Click Record.

3.4 Recording Receiving Worksheet Details for an Order

You can record the receiving worksheet details for a shipment based on the order number.

To record the receiving worksheet details:

1. From Menu Tasks, select Receiving > Record Worksheet for Order. The Record Receipt screen for an order displays.
2. In the Record Order # field, enter the order number of the shipment.
3. Click Proceed.
 - If the order contains a single shipment, the Record Receipt for an Order screen displays. For more information about recording receipt details, see [Section 3.4.1, "Recording Receipt Details for an Order"](#).
 - If the order contains multiple shipments, the Select Shipment screen displays. From the list select the shipment for which you

want to record the receipt details and click Proceed. For more information about selecting a shipment, see [Section 3.2.1, "Selecting Shipment for an Order"](#).

- If the order does not contain any shipment, the Record Receipt for an Order screen displays. For more information about recording receipt details, see [Section 3.4.1, "Recording Receipt Details for an Order"](#).
- If more than one order exists with the same order number, the Select Order screen displays. For more information about selecting an order, see [Section 3.2.2.1, "Selecting an Order"](#). From the list select the order for which you want to record the receipt details and repeat [Step 3](#).

3.4.1 Recording Receipt Details for an Order

To record the receipt details:

1. In the Receipt Details panel, you can view the address from where the shipment is shipped, order number, carrier used for the shipment, order date, and requested delivery date.

In the BOL # field, enter the BOL number. You can view this field only if the order does not contain any shipment.

Check the Receipt Complete box if you want to record discrepancies. You cannot receive an order, once a discrepancy is recorded for the order.

2. In the pre-assigned Orders panel, you can view the item identifier, description, the quantity of items shipped, the quantity of items received, the base unit of measure for the item, and the quantity of items received.
 - a. In the Damaged field, enter the damaged quantity, if applicable. By default, the damaged quantity displays.
 - b. In the UOM field, select the UOM from the drop-down list, if applicable.
 - c. In the Damaged field, enter the alternate quantity of items damaged.

- d. In the UOM field, select the alternate UOM for the item from the drop-down list.
- e. Click Record.

Note: If you check the Receive with no discrepancies box, the ordered quantities automatically display in the Stock Replenishment Orders panel.

3. In the Stock Replenishment Orders panel, you can view the following information:
 - a. In the Item ID field, the item identifier displays.
In the Description field the item description displays.
 - b. In the Shipment Qty field, the quantity of items shipped displays.
 - c. In the Receivable Qty field, you can view the sales order number, identifier of the item, description of the item, and ordered quantity of the item.
 - d. In the UOM field, the base unit of measure for the item displays.
 - e. In the Received field, enter the quantity of items received.
 - f. In the UOM field, select the UOM for the item from the drop-down list.

Note: You can enter only two alternate UOMs.

- g. In the Received field, enter the alternate quantity of items received, if applicable.
- h. In the UOM field, select the alternate UOM for the item from the drop-down list.
- i. In the Damaged field, enter the damaged quantity, if applicable.
By default, the damaged quantity displays.
- j. In the UOM field, select the UOM from the drop-down list, if applicable.



- k. In the Damaged field, enter the alternate quantity of items damaged.
- l. In the UOM field, select the alternate UOM for the item from the drop-down list.
- m. Click Record.

Note: If you check the Receive with no discrepancies box, the ordered quantities automatically display in the Stock Replenishment Orders panel.

3.5 Receiving Blind Receipts

Blind receiving is the process of receiving items in a store for which an order or BOL does not exist in the system.

To record a blind receipt:

1. From Menu Tasks, select Receiving > Blind Receiving. The Record Blind Receiving screen displays.
2. Under the Source panel:
 - Choose Transfer from Store, if inventory is transferred from another store. Click  to select the store name. For more information about searching for a store, see [Section 4.2.3.1, "Searching for a Store"](#).
By default, this option is always selected.
 - Choose Ship from Vendor, if inventory is received from a vendor. Click  to select the vendor. For more information about searching for a vendor, see [Section 3.1.1.1, "Searching for a Vendor"](#).
 - Choose Transfer from DC, if inventory is received from a DC. Enter or select the DC from the drop-down list.
3. Under the Receipt Info panel:
 - a. In the BOL # field, enter the BOL number of the item.
 - b. In the Trailer # field, enter the trailer number of the shipment.

4. In the Item ID field, enter the item identifier you want to record. For more information about searching for inventory, see [Section 2.1, "Searching for Inventory"](#).
In the Description field, a brief description of the item displays.
5. In the Received Qty field, enter the received quantity.
6. In the UOM field, select the UOM of the item from the drop-down list, if applicable.
7. In the Received Qty field, enter the alternate quantity of items received.
8. In the UOM field, select the alternate UOM of the item from the drop-down list.



Note: You can enter only two alternate UOMs.



9. Click Confirm.

3.6 Searching for Inbound Shipments

You can search and view all inbound shipments.

To search an inbound shipment:

1. From Menu Tasks, select Receiving > Find Inbound Shipment. The Shipment Console screen displays.
2. In the Search Shipment panel, under Search for:
 - Choose All Shipments to search for all shipments that are yet to be received.
By default, this option is always selected.
 - Choose Transfer from Store, if inventory is transferred from another store. Click  to select the store name. For more information about selecting a store, see [Section 4.2.3.1, "Searching for a Store"](#).
 - Choose Ship from Vendor, if inventory is received from another vendor. Click  to select the vendor. For more information about searching for a vendor, see [Section 3.1.1.1, "Searching for a Vendor"](#).

- Choose Transfer from DC, if inventory is received from a DC. Enter or select the DC from the drop-down list.
3. Under Expected:
 - Choose Till Date, to view shipments that are expected to be received up until this day.
 - Choose Between, and enter the from and to date to view a list of shipments for the selected date range. Click  to select a date from the calendar.
 4. Under Containing, enter the identifier of the item. Click  to search for an item. For more information about searching for inventory, see [Section 2.1, "Searching for Inventory"](#).
 5. Click Search. The Search Result panel displays, which lists all shipments.
 6. Select the shipment and click View Shipment Details to view the shipment details. For more information about viewing shipment details, see [Section 3.6.1, "Viewing Shipment Details"](#).

3.6.1 Viewing Shipment Details

You can view the inbound shipment details for the selected shipment.

- In the Shipment Details panel, you can view the BOL number, the address from which the shipment is shipped, the status of the shipment, the shipment number, the shipment type, the date on which the shipment is expected, and the code assigned to the carrier.
- In the Shipment Item List panel, you can view the order number associated with the shipment, the item identifier, the received quantity for the item in the shipment and the UOM of the item.

4

Managing Users

User groups are a collection of users who perform a similar task. For example, a group of store users might be put in a Store user group.

Users can belong to multiple user groups, to which permissions are assigned. A user who belongs to multiple user groups retains the least restrictive set of permissions defined by the groups they belong to. For example, if a user belongs to a user group that permits them to use the Application Consoles and they also belong to a user group that only permits them to use the Application Consoles and Configurator, the user will have access to both applications.

This chapter describes how to establish and manage users. You can also transfer a user from one store to another.

4.1 Changing the Password

The Change Password screen provides you the ability to change your password.

To change the password:

1. From Menu Tasks, select User > Change Password. The Change Password screen displays.
2. In the Old Password field, enter your case-sensitive old password.
3. In the New Password field, enter your case-sensitive new password.
4. In the Confirm Password field, enter the new password to confirm it.
5. Click Confirm.

4.2 Managing Users

You can search for users, change user credentials, or transfer users to another store. The Sterling Store Inventory Management does not allow users to modify their own credentials.

This section explains how to modify credentials of the selected user and assign user groups.

4.2.1 Searching for Users

You can search a user and modify the user's credentials.

To search for a user:

1. From Menu Tasks, select User > Manage Users. The Manage Users screen displays.
2. In the Search Users panel:
 - a. In the Store field, the store name displays.
 - b. In the User ID field, enter the identifier of the user. You can either enter the complete identifier or a part of the identifier.
 - c. In the User Name field, enter the name of the user whose status or group needs to be changed

Note: Both User ID and User Name are case-sensitive.



- d. In the Status field:
 - Choose Active, if the user is currently an active user.
 - Choose Inactive, if the user is currently an inactive user.
3. Click Search.
 - If there exists only one user for the entered search criteria, the modifying user details screen displays. For more information about modifying user credentials, see [Section 4.2.2, "Modifying User Credentials"](#).
 - If multiple users exist for the search criteria, the search results display in the Search Result panel. You can view the user identifier, user name, and store's information.

Select the User ID whose credentials you want to modify and click Proceed.

4.2.2 Modifying User Credentials

You can modify credentials for the selected user and also assign user groups.


In the User Detail panel, you can view the identifier of the user, user name, store information, and the current status of the user.

1. In the Change User Credentials panel:
 - Choose Activate to activate the user.
 - Click the Deactivate to deactivate the user.
2. In the Assign User Groups panel:
 - To subscribe the user to a user group, select the user group and click .
 - To unsubscribe the user from a user group, select the user group and click .
3. Click Confirm.

4.2.3 Transferring Users to a Store

You can transfer the selected user to another store.

To transfer a user to another store:

1. From Transfer Store, select Transfer Store. The Transfer Store screen displays.
2. In the Transfer to Store field, enter the store name.
If you want to search for a store, click . For more information about searching a store, see [Section 4.2.3.1, "Searching for a Store"](#).
3. Click Confirm.

4.2.3.1 Searching for a Store

To search for a store:

1. In the Store # field, enter the store number, if applicable.

2. In the Store Name field, enter the complete store name or a part of the store name, if applicable. This field is case-sensitive.
3. In the City field, enter the complete city name or a part of the city name, if applicable. This field is case-sensitive.
4. In the State field, enter the complete state name or a part of the state name, if applicable. This field is case-sensitive.

For example, if you enter the state as California, all stores available in California are listed in the Search Results panel.

5. In the Max Records field, enter the maximum number of records to be listed as a result of your search.

By default, the value entered is 30.

6. Click Search. The search results display in the Search Result panel.
7. From the Store List panel, select the store where you want to transfer the user.
8. Click Proceed.

Performing Outbound Tasks

This chapter explains the various outbound tasks that you can perform using the Sterling Store Inventory Management.

5.1 Printing a Pick Ticket

In a store, pick tickets are generated and items are picked based on the pick tickets.

To print a pick ticket:

1. From Menu Tasks, select Shipping > Print Pick Ticket. The Print Pick Ticket screen displays.
2. If you want to print pick tickets for all shipments that are awaiting back room pick, choose Print pick tickets for all... orders pending shipping.

By default, this option is always selected.

3. If you want to print a pick ticket for an order, choose Print pick tickets for order #, and enter the order number in the box.
 - If an order has a single shipment that is awaiting back room pick, the pick ticket is directly printed.
 - If an order has multiple shipments, the Advanced Search screen displays. From the list, select the shipment for which you want to print the pick ticket and click Print.
4. If you want to search for all the shipments in an order, choose Lookup an order to print pick tickets and click Search. The Find orders to print pick ticket screen displays. For more information about searching for an order, see [Section 5.1.1, "Searching for an Order"](#).

5.1.1 Searching for an Order

You can search for an order and print pick ticket for shipments in the order.

To find a shipment:

In the Find Order to print pick ticket panel:

1. In the Credit Card # field, enter the credit card number given by the customer.
2. In the Order # field, enter the order number, if applicable.
3. In the Phone # field, enter the phone number of the customer, if applicable.
4. In the Last Name field, enter the last name of the customer, if applicable.
5. In the First Name field, enter the first name of the customer, if applicable.
6. In the Orders not picked up for... days field, enter the number of days the shipment has been ready for customer pick up, if applicable.
7. Click Search.

Note: All these fields are case-sensitive.



In the Search Results panel, you can view the customer name, shipment number, status of the shipment, order number, and the date on which the store was notified of the shipment creation. Select a shipment for which you want to print pick ticket.

Click  to print the pick ticket.  indicates that the pick ticket has already been printed for the shipment number.

5.2 Searching for Shipments

You can search for the shipments that are ready for customer pick up or delivery.

To find a shipment:

1. From Menu Tasks, select Shipping > Search Shipment. The Shipment Search screen displays.
2. In the Basic Search Parameters panel:
 - a. In the Shipment # field, enter the shipment number.
 - b. In the Order # field, enter the order number.
 - c. In the BOL # field, enter the BOL number of the shipment.
 - d. In the Manifest # field, enter the manifest number.
 - e. In the Tracking # field, enter the tracking number of the manifest shipment.
 - f. In the Last Name field, enter the last name of the customer.
 - g. In the First Name field, enter the first name of the customer.
 - h. In the Phone # field, enter the customer's phone number.
 - i. In the Zip Code field, enter the zip code of the customer.
3. In the Advanced Search Parameters panel:
 - a. In the Item ID field, enter the item identifier. Click  to search for an item. For more information about searching for inventory, see [Section 2.1, "Searching for Inventory"](#).
 - b. In the Shipment Status field, select the status of the shipment from the drop-down list.
 - c. In the Req Ship Date field, enter the date to view a list of shipments for the selected date range.
Click  to select the date from the calendar.
 - d. In the Delivery Method field, choose any of the following options:
 - To view all the shipments ready for customer pick up, choose Pick Up.
 - To view all the shipments ready to be shipped to the customer, choose Ship Out.
 - To view all the shipments that are ready for customer pick up or delivery, choose Both.
 - e. In the Document Type field, choose any of the following options:

- To view all the outbound shipments against sales order, choose Sales Order.
 - To view all the outbound shipments against transfer order, choose Transfer Order.
 - To view all the outbound shipments, choose Both.
- f. Click Search.
- In the Search Results panel, you can view the shipment number, order number, customer name and address, the requested date of shipment, and current status of the shipment.
4. Do any of the following:
- Click Show Criteria. The Shipment Search panel displays. If you want to modify the search criteria, repeat [Step 2](#) through [Step 3](#).
 - Click View Details to view more information about the selected shipment. For more information about viewing the shipment details, see [Section 5.2.1, "Viewing Shipment Details"](#).
 - Click More Results to view more records. You can view a maximum of 200 records. By default, the system displays only 30 records.

5.2.1 Viewing Shipment Details

You can view the shipment information for the selected shipment.

In the Shipment Details panel, you can view the shipment number, order number, shipment status, requested ship date, and the carrier of the shipment.

In the Bill To Address panel, you can view the customer name and address.

In the Shipment Lines panel, you can view the item identifier, item description, quantity of the item, unit of measure for the item, unit price of the item, and line price. Line price is calculated as $\text{Quantity} * \text{Unit Price}$.

You can also view the total price, total charges, if any, and the total tax incurred.

5.2.2 Reversing a Back Room Pick

After a store associate performs the back room pick, you can undo the back room pick.

To Undo a back room pick for a shipment:

1. In the Search Results panel, select the shipment for which you want to reverse the back room pick.
2. From Exception Tasks, select Undo Backroom Pick. A confirmation window displays.
3. Click OK. The shipment status changes to Ready For Backroom Pick.

Note: Once you undo the back room pick, the store associate must manually move the inventory to the back room and record the inventory movement.

5.2.3 Removing Shipments From a Manifest

You can remove shipments that are added to a manifest.

To remove shipments from a manifest:

1. In the Search Results panel, select the shipment that you want to remove from manifest.
2. From Exception Tasks, select Remove from manifest. A confirmation window displays.
3. Click OK to remove the shipment from the manifest.

5.2.4 Modifying the Container Information

You can add or delete containers in the shipment from a manifest.

To modify containers:


1. In the Search Results panel, select the shipment for which you want to modify the container details.
2. From Exception Tasks, select Modify container information.

In the Shipment Details panel, you can view the shipment number, order number, shipment status, requested ship date, and the carrier of the shipment.

In the Customer Address panel, you can view the customer name, address, phone number, and zip code.

In the Modify Containers panel, you can view the container details in a shipment such as tracking number, container weight, and unit of measure for the weight of the container.

3. Modify the tracking number and weight of the container, if applicable.

If you want to delete a container from the shipment, select a tracking number and click .

If you want to add another container, leave the current row and click the next row.

4. Click Save.

5.2.5 Viewing Shipment Audit

You can view the audit trail for shipment modification.

From General Tasks, select View Shipment Audit.

- In the Shipment Details panel, you can view the shipment number, order number, shipment status, customer name, the billing address, the address where the shipment needs to be shipped, and the date on which the store is notified.
- In the Shipment Audit panel, you can view the date the shipment was modified, the person who performed the modification, the modifications against the shipment, the attribute that was modified for the shipment, the attribute value before making the modification, the value after the shipment was modified, reason for modification, and additional information as to why the modification was made.
- In the Shipment Line Audit panel, you can view the date the shipment line was modified, the person who performed the modification, the modifications against the shipment line, the attribute that was modified for the shipment line, the attribute value before making the modification, the value after shipment line was modified, reason for modification, and additional information as to why the modification was made.

5.3 Recording a Back Room Pick

After picking all items, you can record the back room pick for each item on the pick ticket.

To record a back room pick:

1. From Menu Tasks, select Shipping > Record Backroom Pick. The Record Receipt screen displays.
2. In the Shipment # field, enter the shipment number for which you want to record the back room pick.
3. Click Search.
 - If a single shipment exists for the entered shipment number, the Record Backroom Pick screen displays. For more information about recording back room pick, see [Section 5.3.1, "Recording Back Room Pick for a Shipment"](#).
 - If multiple shipments exist for the entered shipment number, the Search Results panel displays. In the Search Results panel, you can view the identifier of the user who performed the back room pick, address to which the shipment is shipped, order number of the shipment, shipment number, date on which the store is notified, and status of the shipment. Select the appropriate shipment.

Click Next. The Record Backroom Pick screen displays. For more information about recording back room pick, see [Section 5.3.1, "Recording Back Room Pick for a Shipment"](#).

5.3.1 Recording Back Room Pick for a Shipment

You can record the quantity of items picked from the back room for the entered shipment.

To record the picked quantity:

- If the store is in select mode, the Shipment Details panel displays. You can view the shipment number, order number, date on which the store is notified, and the customer name.
- If the store is in scan mode, you can view the shipment number.
 - In the Item ID field, enter the item identifier of the item scanned. This is applicable for scanned items.

- In the last scanned item field, enter the identifier of the last scanned item.
- In the Last Scanned Quantity field, enter the quantity of items last scanned.

When an item is scanned, the item identifier displays. Once you press the tab key, the last scanned quantity displays for that item.

- In the Items available for picking panel, you can view the order number, the item identifier, the item description, quantity of item ordered by the customer, and the unit of measure for the item.
 - a. In the Pick Qty field, enter the quantity of items picked. This is applicable if the store is in select mode.
 - b. In the UOM field, select the UOM of the item from the drop-down list.
 - c. In the Pick Qty field, enter the alternate item quantity that you picked.

Note: In the Sterling Store Inventory Management, the blank field indicates that you need to enter the quantity based on the alternate UOM displayed.

- d. In the UOM field, the alternate UOM of the item automatically displays. Select the alternate UOM of the item from the drop-down list, if applicable.

The quantity of items that are picked and the unit of measure for the item automatically displays.

- e. Click Next. The Shortage Resolution screen displays. For more information about resolving shortage, see [Section 5.3.2, "Resolving Shortages for a Back Room Pick"](#).

Note: If there is excess inventory in the customer location, you need to move inventory from the customer location to the backroom location.

5.3.2 Resolving Shortages for a Back Room Pick

You can record shortages, if any, when performing a back room pick.

To resolve shortages:

1. In the Shortage Resolution panel:
 - If the shortage is due to inadequate inventory, choose Inventory Shortage. The shortage quantity is backordered.
 - If you want to pick only some items now and want to pick the remaining items later, choose Will pick later.
 - If shortage is due to both inadequate inventory and partial pick, choose Shortage resolution varies by line.

In the Shortage Resolution on each item panel, you can view the order number, identifier of the item, item description, ordered quantity, shortage quantity, and unit of measure for the item.

Note: The Picked Location on each Item panel appears only when you choose Shortage resolution varies by line.

2. Click Confirm.

5.4 Searching for a Customer Order

When a customer walks into the store with the proof of purchase and picks up an order, it is called as customer pick. You can verify the customer details based on the credit card number or other details provided by the customer.

To search for a customer order:

1. From Menu Tasks, select Shipping > Record Customer Pick. The Pickup Order screen displays.
2. In the Enter Search Criteria panel:
 - a. In the Credit Card # field, enter the credit card number given by the customer, if applicable.
 - b. In the Order # field, enter the order number, if applicable.

- c. In the Phone # field, enter the customer's phone number, if applicable.
- d. In the Last Name field, enter the last name of the customer, if applicable.
- e. In the First Name field, enter the first name of the customer, if applicable.
- f. In the Orders not picked up for... days field, enter the number of days the shipment has been ready for customer pick up, if applicable.
- g. Click Search.

Note: All these fields are case-sensitive.

In the Search Results panel, you can view the customer name, the billing address of the shipment, order number, the date on which the store is notified of the shipment creation, and the status of the shipment. Select the shipment from the list and click Next.

If the customer cannot provide the credit card number, you may need to verify other details.

5.4.1 Verifying Customer Details

In the Order Summary panel, you can view the name of the customer picking up the purchase, the name of the customer to whom the purchase is billed, order number, the date on which store is notified of the purchase, and the status of the purchase.

In the Customer Address panel, the address of the customer displays.

In the Bill To Address panel, the billing address displays.

To verify a customer details:

1. In the Enter Verification Details panel, enter the last four digits of the credit card.

If the customer cannot provide the credit card number, click Show Manual Verification.

2. In Manual Verification panel:

- If you are verifying customer address, choose Address Verified.
- If you are verifying customer license, choose License Verified.
- If you are verifying the passport, choose Passport Verified.
- If you are using other verification methods, choose Other Verification.

3. Click Next.

5.4.2 Selecting Items

You can select items from an order picked by the customer.

In the Order Summary panel, you can view the name of the customer picking up the purchase, the name of the customer to whom the purchase is billed, order number, the date on which the store is notified of the purchase, and the status of the purchase.

In the Scan Item panel, you can view the item identifier, the last scanned item, and the quantity of items last scanned.

When you scan an item, the identifier of the item displays in the item ID field. Once you press the Tab key, the last scanned quantity displays for that item.

Note: You can view the Scan Item panel only if the scan mode is enabled.

In the Select Items to Pick panel, you can view the item identifier, item description, the quantity picked from back room, the unit of measure for the item, the item unit price, the current unit price, and the extended price of the item. Click Next.

- If there is a shortage in the picked quantity, the Resolving Shortage screen displays. For more information about resolving shortage, see [Section 5.4.3, "Resolving Shortages for Customer Picks"](#).
- If no shortage exists, the Order Summary screen displays. For more information about the order summary, see [Section 5.4.4, "Viewing Order Summary"](#).

5.4.3 Resolving Shortages for Customer Picks

You can record shortages, if any, during a customer pick as well as the reason for shortage.

To resolve shortages for customer picks:

- Choose Customer to pick up remaining later due to, if you want to record partial customer pick. To record the reason for a partial customer pick:
 - Choose Inventory Shortage, if there is inadequate inventory for customer pick.
 - Choose Customer Preference, if the customer wants to collect the remaining inventory later.
- Choose Cancel remaining due to, if customer wants to cancel a part of the order and select the reason for cancellation from the drop-down list. You can also enter the reason.
- Choose Shortage resolution varies by line, if item shortage is due to inadequate inventory or due to customer preference.

Click Next. The Order Summary screen displays. For more information about verifying order details, see [Section 5.4.4, "Viewing Order Summary"](#).

5.4.4 Viewing Order Summary

You can view the order summary and verify the details of the order.

To view order details:

- In the Order Summary panel, you can view the name of the customer picking up the purchase, the name of the customer to whom the purchase is billed, order number, the date on which store is notified of the purchase, and the status of the purchase.
- In the Items Picked panel, you can view the item identifier, item description, the ordered quantity, the unit of measure for the item, the quantity picked from back room, the order unit price, the current unit price, and the extended price of the item. It also displays total number of picked items and the total amount.
- In the Items not picked panel, you can view the item identifier, item description, the ordered quantity, the unit of measure for the item,

the quantity of items not picked from the back room, the item unit price, the current unit price, and the extended price of the item. It also displays the total number of items not picked and the total amount.

- In the Items Cancelled panel, you can view the item identifier, item description, the ordered quantity, the unit of measure for the item, the cancelled quantity, the item unit price, the current unit price, and the extended price of the item. It also displays the total number of items cancelled and the total amount.
- Click Confirm to save the details.

5.5 Creating a Bill of Lading

You can create a Bill of Lading (BOL) for a load.

To create a BOL:

1. From Menu Tasks, select Shipping > Create BOL. The Create BOL screen displays.
2. In the Create BOL for a shipment panel:
 - In the Shipment # field, enter the shipment number.
 - In the Order # field, enter the order number of the shipment.
3. Click Create. The Shipment Consolidation screen displays. For more information about consolidating shipments for a load, see [Section 5.5.2, "Consolidating Shipments"](#).

If the order has multiple shipments, the Select Shipment screen displays. For more information about selecting a shipment, see [Section 5.5.1, "Selecting a Shipment"](#).

If shipments do not exist for the order, the Create Load screen displays. For more information about creating a load, see [Section 5.5.3, "Creating a Load"](#).

5.5.1 Selecting a Shipment

You can view shipments related to an order and select a shipment.

- In the Shipment List panel, you can view the shipment number, order number for the shipment, customer name, total weight of the

shipment, unit of measure of the shipment, total volume, status of the shipment, and the date on which the shipment needs to be shipped to the customer.

To select a shipment:

1. Select the shipment from the list.
2. Click Next.

Based on the shipment you selected, the system verifies if there are more shipments that are shipped to the same customer or destination. If shipments are found, the Shipment Consolidation screen displays.

5.5.2 Consolidating Shipments

You can view details of the selected shipment. You can also view other shipments that are to be shipped to the same customer or destination.

- In the Shipment Details panel, you can view the shipment number, order number, name of the customer, weight of the shipment, volume of the shipment, and the date on which the shipment needs to be shipped to the customer.
- In the Shipment Address panel, you can view the customer name and address for the previously selected shipment.
- In the Shipments Going To The Same Destination panel, you can view the shipments being shipped to the common customer and destination.

To consolidate shipments:

1. Check the boxes of the applicable shipments you want to consolidate.
The Consolidated Weight and Consolidated Volume for the selected shipments displays.
2. Click the View Details hyperlink to view the details of the shipment. For more information about viewing shipment details, see [Section 5.2.1, "Viewing Shipment Details"](#).
3. Click Next to confirm shipment consolidation. The Create Load screen displays. For more information about creating a load, see [Section 5.5.3, "Creating a Load"](#).

5.5.3 Creating a Load

You can create a new load or include the consolidated shipments in an existing load.

To create load:

1. If you want to create a new load for the shipments, choose Create a new load.
2. If you want to include the shipments in a load being shipped to the common customer and destination, choose Include in an existing load. In the Existing loads panel, a list of all loads being shipped to the same customer displays.
 - In the Existing Loads panel, you can view the load number, customer address to where the shipment is shipped, the carrier code, total weight of the load, and total volume of the load. Select the load to which you want to include the consolidated shipment.
3. Click Next. The Load Confirmation screen displays. For more information about confirming a load, see [Section 5.5.4, "Confirming a Load"](#).

5.5.4 Confirming a Load

You can use this screen to confirm or modify a load that has already been created.

To confirm a load:

1. Navigate to the Load Summary panel.
2. In the SCAC and Service field, select the scac service from the drop-down list.
3. In the PRO # field, enter the PRO number of the load.
4. In the Trailer # field, enter the trailer number of the trailer.
5. In the Freight Terms field, select the freight terms from the drop-down list.

In the Load Weight/Volume panel, you can view the total weight of the load and total volume of the load. If you want to remove shipment lines from a load, click the Has Truck Limit Exceeded hyperlink. The Load Summary screen displays. For more information

about removing shipment lines, see [Section 5.5.4.1, "Removing Shipment Lines from a Load"](#).

In the Destination Address panel, you can view the name and address of the destination where the shipment is shipped.

6. In the BOL Instructions panel, enter the instructions for a BOL, if applicable.

In the Shipments in the load panel, you can view the shipment number, order number, total weight of the load, unit of measure for the weight, total volume of the load, and the number of pallets and cartons in the shipment. You can enter the number of pallets and cartons. Click Save, if you want to save the load and keep it open. You can click Confirm to confirm the load.

5.5.4.1 Removing Shipment Lines from a Load

You can remove any shipment lines or reduce the quantity of a shipment in a load.

In the Load Summary panel, you can view the load number, the SCAC service, PRO number, trailer number, and freight terms.

In Load Weight/Volume panel, you can view the total weight and total volume of the load.

In the Destination Address panel, you can view the name and address to where the shipment is shipped.

In the Shipment Lines panel, you can view the shipment number, the order number of the shipment, the item identifier, item description, and the item quantity in the shipment.

To remove the shipment lines:

1. In the Remove Quantity field, enter the quantity of items you want to remove from the shipment line.

Based on the quantity entered, the total weight and total volume of the shipment line displays. You can also view the UOM of the item.

2. Click Save.

5.6 Opening a Manifest

You can open a manifest for a shipment or add a shipment to an existing manifest.

To open a manifest for a shipment:

1. From Menu Tasks, select Shipping > Add Shipment To Manifest. The Add To Manifest screen displays.
2. In the Identify Shipment panel:
 - In the Shipment # field, enter the shipment number of the shipment you want to associate with a manifest.
 - In the Order # field, enter the order number of the shipment you want to associate with a manifest.
3. Click Create. The Manifest Details screen displays. For more information about viewing the details of a manifest, see [Section 5.6.2, "Viewing the Manifest Details"](#).

If the order has multiple shipments, the Select shipment screen displays. For more information about selecting a shipment, see [Section 5.6.1, "Selecting a Shipment for a Manifest"](#).

5.6.1 Selecting a Shipment for a Manifest

You can view shipments related to an order and select a shipment.

- In the Shipment List panel, you can view the shipment number, order number for the shipment, customer name, total weight of the shipment, unit of measure of the shipment, total volume, status of the shipment, and the date on which the shipment needs to be shipped to the customer.

To select a shipment:

1. Select the shipment from the list.
2. Click Next. The Manifest Details screen displays. For more information about viewing a manifest, see [Section 5.6.2, "Viewing the Manifest Details"](#)

5.6.2 Viewing the Manifest Details

You can view the manifest details and select the carrier associated with the shipment.

To view the manifest details:

In the Shipment Identifier panel, you can view the shipment number and order number of the shipment.

1. In the Shipment Details panel:
 - a. In the SCAC and Services field, select the SCAC associated with the shipment from the drop-down list.
 - b. In the Freight Terms field, select the freight term from the drop-down list.

You can view the customer name, the date by which the shipment is shipped to the customer, the weight of the shipment and the volume of the shipment.

In the Shipment Address panel, you can view the name and address of the customer to whom the shipment is shipped.

2. In the Add Containers panel:
 - a. In the Tracking # field, enter the container tracking number.
 - b. In the Container Weight field, enter the weight of the container.
The unit of measure for the weight of the container automatically displays.
3. In the Manifest Details panel, you can view the manifest information based on the selected carrier.
 - If you want to add a shipment and keep the manifest for the selected SCAC open, choose Keep the manifest open.
 - If you want to add a shipment to the manifest and close the manifest, choose Close the manifest.
 - If a manifest does not exist for the selected carrier, you can open a new manifest by entering a new manifest number. This option displays only if the carrier has no open manifests.
4. Click Save.

6

Managing Alerts

An alert is a message directed to a queue about a transaction that may need manual intervention or review. Alerts are raised by the system when specific events occur.

Alerts may be picked up and resolved by users who have permissions to access the alert. Irrespective of the user who has picked up the alert, all users who have permission to access the alert can view the alert information.

Alerts are raised using either monitoring rules or event handlers that get invoked when calling an API.

This chapter explains how to manage alerts.

6.1 Viewing Informational Alerts

You can view alerts raised by the system and the total number of times it was raised.

To view the alert information:

1. From Menu Tasks, select Alerts > View Alerts. The Informational Alerts screen displays.

You can view the alert type and the total number of times it was raised.

2. Click the View Details hyperlink to view the alert details. For more information about viewing alert details, see [Section 6.1.1, "Viewing Alert Details"](#).

6.1.1 Viewing Alert Details

The alert details displayed are based on the alert type. In the Information Alert List panel, you can view alert details for the following alert types:

- Delayed Customer Pick
- Inventory Adjustment Variance value above threshold value
- Inventory Shortage

6.1.1.1 Viewing Alert Details for the Delayed Customer Pick Alert Type

You can view the shipment number, date on which the customer needs to pick up the shipment, and the customer address. The customer details are provided if the store associate wants to inform the customer of the shipment.

Click Mark All As Reviewed if you have examined all alerts. This button is permission controlled.

6.1.1.2 Viewing Inventory Adjustment Variance Value Above the Threshold Value

You can view the identifier of the item, item description, quantity adjusted, item's unit of measure, cost of adjustment, and reason code for performing the adjustment.

Click Mark All As Reviewed if you have examined all alerts. This button is permission controlled.

6.1.1.3 Viewing Inventory Shortage

You can view the identifier of the item, shortage quantity, on hand quantity, unit of measure of the item, and the horizon end date.

Click Mark All As Reviewed if you have examined all alerts. This button is permission controlled.


6.1.2 Creating Alerts

You can create new alerts and log notes for future reference.

To create an alert:

1. From Alerts Tasks, select Create Alert. The Create Alert screen displays.
2. In the Alert Type field, select the appropriate alert type from the drop-down list.
3. In the User field, enter the name of the user to whom the alert is assigned.

If you do not know the user's identifier, click the Find User hyperlink. The Find User pop-up window displays. For more information about searching for a user, see [Section 6.1.2.1, "Finding a User"](#).

4. In the Follow-up Date field, enter the date on which the user needs to follow up on the alert. Click  to select the date.
5. In the Priority field, the priority of the chosen alert type displays. You can also enter the priority of the alert.
6. In the Queue field, the assigned queue for the chosen alert type displays. You can change the queue by selecting a different queue from the drop-down list.
7. In the Details panel, you can enter the details of the alert.
8. Click Create to create an alert.

6.1.2.1 Finding a User

You can use the Find User pop-up to find a user.

To find a user:

1. In the User ID Contains field, enter the identifier of the user. You can also search by entering a partial user identifier.
2. In the User Name Contains field, enter the name of the user to whom the alert needs to be assigned. You can search by entering a partial user name.

Note: The User ID Contains and User Name Contains fields are case-sensitive.

3. Click Find User. A list of users matching the search criteria displays.
4. Double-click the appropriate user's identifier.

6.1.3 Viewing the Alert Information

You can view your alert information that displays in the form of a tree structure.

To view the alert information:

1. From Alert Tasks, select View My Alerts And Queues. A tree structure that provides a list of various alerts and queues displays, which contains:
 - My Alerts Due For Follow-up — This displays the total number of alerts open or due for follow-up on the current or the next day.
 - My Alerts — This displays the total number of alerts assigned to the user.
 - My Queues — This displays all queues to which the user is subscribed.
2. Double-click an alert or queue to view the list of alerts. For more information about viewing the list of alerts, see [Section 6.1.3.1, "Viewing a List of Alerts"](#).

6.1.3.1 Viewing a List of Alerts

You can view a list of alerts assigned to the user.

- In the Alert List panel, you can view the alert identifier, priority of the alert, alert type, date on which the alert was created, number of times the alert was raised, and the queue to which the alert belongs.
- Double-click an alert or queue for which you want to view details. For more information about viewing alert details, see [Section 6.1.5, "Viewing Alert Details"](#).

6.1.4 Searching for Alerts

You can search for alerts that are created.

To search for an alert:

1. From Alert Tasks, select Alert Search. The Alert Search screen displays.
2. In the Alert Search Criteria panel, in the Alert Type field, select the alert type from the drop-down list, if applicable.
3. In the Queue field, select the queue from the drop-down list, if applicable. You can view all queues assigned to you.
4. In the Assigned To User field, enter the identifier of the user by selecting the appropriate condition from the drop-down list. You can also perform a search by entering a part of the user's identifier.
5. In the Created On From field, enter the date range to search for alerts that are created within the specified date range.
6. In the Alert Status field:
 - Select Open to search for alerts that are open.
 - Select WIP to search for alerts that are still work in progress.
 - Select Closed to search for alerts that are closed.
7. In the Follow-up Date From field, enter the date range to search for alerts.
8. In the Raised Count field, enter the number of times the alert was raised by selecting the appropriate condition from the drop-down list.
9. In the Priority field, enter the priority of the alert by selecting the appropriate condition from the drop-down list.
10. Click Search.

In the Alert List panel, you can view the alert identifier, alert priority, alert type, date on which the alert was created, number of times the alert was raised, and queue to which the alert belongs.

Double-click on an alert for which you want to view the details. The Alert Details screen displays. For more information about viewing alert details, see [Section 6.1.5, "Viewing Alert Details"](#).

6.1.5 Viewing Alert Details

You can view the details of an alert that matches your search criteria.

- If you want to change the status of an alert, select the appropriate alert status from the Alert Status drop-down list and click Save.

- If you want to modify the follow-up date for an alert, enter the appropriate date in the Follow-up Date field and click Save.

In the Notes panel, you can view any additional information about the alert.

- If you want to enter notes for an alert, click the Add Note hyperlink. The Add Notes for the Alert pop-up window displays. Enter information or specific instructions for the alert and click Add Note. The note displays in the Notes panel.

6.1.6 Closing an Alert

You may need to close an alert, if it is no longer valid.

To close an alert:

1. From Alert Tasks, select Close Alert. The Close Alert screen displays. You can view the identifier of the user who wants to close the alert.
2. In the Notes panel, add appropriate notes to explain why you are closing the alert.
3. Click Close.

6.1.7 Assigning Alerts to a User

An alert can be assigned to a particular user so that it can be addressed by that user.

To assign alerts to a user:

1. From Alert Tasks, select Assign To User. The Assign Alert to User screen displays.
2. In the Currently Assigned To User ID field, the user identifier of the user who has currently been assigned the alert displays.
3. In the Assign To User ID field, enter the identifier of the user to whom you want to assign the alert.

To search for the user ID of the user to whom you want to assign the alert, enter the user details in the Find User panel.

4. In the Find User panel:

- a. In the User ID Contains field, enter the user identifier of the user. You can search by entering a partial user identifier.
 - b. In the User Name Contains field, enter the user name of the user to whom the alert needs to be assigned. You can search by entering a partial user name.
 - c. Click Find User. The list of users matching the search criteria displays.
5. In the Notes panel, enter the appropriate additional information.
 6. Click Assign.

6.1.8 Assigning Alerts to a Queue

You can move an alert to a different queue.

To move an alert to a different queue:

1. From Alert Tasks, select Assign To Queue. The Assign Alert To Queue screen displays.
2. In the Currently Assigned To Queue ID field, the identifier of the queue displays.
3. In the Assign To Queue ID field, enter the identifier of the queue to which you want to assign the alert.

To search for the Queue ID of the queue to which you want to assign the alert, enter the queue details in the Find Queue panel.

4. In the Find Queue panel:
 - a. In the Queue ID Contains field, enter the identifier of the queue. You can search by entering a partial queue identifier.
 - b. In the Queue Name Contains field, enter the name of the queue to which the alert needs to be assigned. You can search by entering a partial queue name.
 - c. Click Find Queue. The list of queues matching the search criteria displays.
5. In the Notes panel, enter the appropriate additional information.
6. Click Assign.

This chapter explains the various documents that are printed daily in a store as and when requested or when initiated by the occurrence of specific events.

The Sterling Store Inventory Management provides the following prints:

- [Inbound Prints](#)
- [Inventory Prints](#)
- [Outbound Prints](#)

7.1 Inbound Prints

The following inbound prints can be generated using the Sterling Store Inventory Management:

- [Receiving Worksheet for Bill Of Lading](#)
- [Customer Label](#)
- [Receiving Worksheet for an Order](#)
- [Receiving Discrepancy Report](#)

7.1.1 Receiving Worksheet for Bill Of Lading

You can print the receiving worksheet for a shipment based on the BOL number. If the shipment is a part of the sales order, the customer label is printed along with the receiving worksheet. For more information about the customer label, see [Section 7.1.2, "Customer Label"](#).

The following is the default Receiving Worksheet for BOL that the Sterling Store Inventory Management prints:

RECEIVING WORK SHEET									
XYZ_S3 1684, Langford Road Dallas 22046 VA US							Date 07/31/2006		
BOL #		SOPRCVBO		Shipment #		SOPRCVTO2		Shipped From	
Ship Date		07/01/2006		ETA		07/01/2006		Carrier	
Pre-assigned Orders									
Sales Order #	Item ID	Description	Shipment Qty	UOM	Received	UOM	UOM	Damaged UOM	UOM
SOPRCVSALE2	MOUSE	Mouse	10.00	EACH	_____	_____	_____	_____	_____
Stock Replenishment Orders									
Item ID	Description	Shipment Qty	UOM	Received	UOM	UOM	Damaged UOM	UOM	UOM
MOUSE	Mouse	17.00	EACH	_____	_____	_____	_____	_____	_____
Additional Items									
Order #	Item ID	Description	Received	UOM	UOM	Damaged UOM	UOM	UOM	UOM

Table 7-1 Receiving Worksheet for BOL

Field	Description
This worksheet includes the store address, BOL number, shipping date, shipment number, ETA, and carrier used for the shipment.	
Pre-Assigned Orders	
Sales Order #	The sales order number of the shipment received.
Item ID	The identifier of the item.
Description	The item description.
Shipment Qty	The quantity of the shipment being shipped.
UOM	The unit of measure of the item.
Received	The received quantity of the item.
Damaged	The quantity of damaged items.

Table 7–1 Receiving Worksheet for BOL

Field	Description
Stock Replenishment Orders	
Item ID	The identifier of the item.
Description	The item description.
Shipment Qty	The quantity of items being shipped.
UOM	The unit of measure of the item.
Received	The received quantity of the item.
Damaged	The quantity of damaged items.
Additional Items	
Order #	The order number of the shipment received.
Item ID	The identifier of the item.
Description	The item description.
Received	The received quantity of the item.
UOM	The unit of measure of the item.
Damaged	The quantity of damaged items.

7.1.2 Customer Label

The Customer Label provides information on the customer to whom the shipment is shipped. This label is printed only for a sales order.

The following is the default Customer Label that the Sterling Store Inventory Management prints:

Customer	Jack Smith
	ParkAvenue ParkAvenue1 ParkAvenue2 ParkAvenue3 ParkAvenue3
	Newyork Newyork 560024
Order #	SOPORD001
Ship Date	07/13/2006
Notes	

Table 7–2 Customer Label

Field	Description
Customer	The name and address of the customer to whom the shipment needs to be shipped.
Order #	The order number of the sales order.
Ship Date	The date on which the shipment is shipped to the customer.
Notes	Enter additional information about the customer, if applicable.

7.1.3 Receiving Worksheet for an Order

You can print the receiving worksheet for a shipment based on the order number. If the shipment is a part of the sales order, the customer label is

printed along with the Receiving Worksheet. For more information about the customer label, see the [Section 7.1.2, "Customer Label"](#).

The following is the default Receiving Worksheet that the Sterling Store Inventory Management prints:

Store Address

RECEIVING WORK SHEET								Date
TP TP-ADDRESS-LINE TP- ADDRESS-LINE BANGALORE INDIA		Order Date	03/26/2006	Order #	RCV1PO19001			07/31/2006
Pre-assigned Orders								
Stock Replenishment Orders								
Item ID	Description	Shipment Qty	UOM	Received	UOM	UOM	Damaged UOM	UOM
Order	Mouse	100.00	EACH	_____	_____	_____	_____	_____
Order	Keyboard	100.00	EACH	_____	_____	_____	_____	_____

Table 7–3 Receiving Worksheet for an Order

Field	Description
This worksheet includes the store address, order date, and order number.	
Pre-Assigned Orders	
Sales Order #	The sales order number of the shipment received.
Item ID	The identifier of the item.
Description	The item description.
Shipment Qty	The quantity of items being shipped.
UOM	The unit of measure of the item.
Received	The received quantity of the item.
Damaged	The quantity of damaged items.
Stock Replenishment Orders	

Table 7–3 Receiving Worksheet for an Order

Field	Description
Item ID	The identifier of the item.
Description	The item description.
Shipment Qty	The quantity of items being shipped.
UOM	The unit of measure of the item.
Received	The received quantity of the item.
Damaged	The damaged quantity of the item.

7.1.4 Receiving Discrepancy Report

The Receiving Discrepancy Report provides the discrepancy details between the expected quantities and received quantities.

The following is the default Receiving Discrepancy Report that the Sterling Store Inventory Management prints:

Store Address

RECEIVING DISCREPANCY REPORT						
TP TP-ADDRESS-LINE TP- ADDRESS-LINE BANGALORE INDIA		Order #	RCVPO9001	Date	07/31/2006	
		Shipment #				
Order #	Shipment #	Item ID	Description	Discrepancy Type	Discrepancy Quantity UOM	Discrepancy Cost (\$)
RCVPO9001	RCVSHIPPO9001	MOUSE	Mouse	SHORT	25.0 EACH	50.0
RCV3PO19001	RCV3SHIPPO9001	MOUSE	Mouse	DAMAGE	10.0 EACH	30.0
		MOUSE	Mouse	SHORT	10.0 EACH	0.0
RCV1PO19001	RCV1SHIPPO9003	MOUSE	Mouse	DAMAGE	20.0 EACH	0.0
		MOUSE	Mouse	SHORT	9.0 EACH	0.0
RCV21PO19001	RCV21SHIPPO9001	MOUSE	Mouse	DAMAGE	20.0 EACH	0.0
		MOUSE	Mouse	SHORT	10.0 EACH	0.0
	RCV21SHIPPO9003	MOUSE	Mouse	SHORT	50.0 EACH	0.0
		KEYBD	Keyboard	DAMAGE	50.0 EACH	0.0
RCV21PO19003	100000010	MOUSE	Mouse	DAMAGE	1.0 EACH	0.0
Discrepancy Cost						80.0

Table 7-4 Receiving Discrepancy Report

Field	Description
	The report includes the address of the store, order number, shipment number, and the date on which the report is generated.
Order #	The order number of the shipment.
Shipment #	The shipment number of the shipment.
Item ID	The identifier of the item.
Description	The description of the item.

Table 7–4 Receiving Discrepancy Report

Field	Description
Discrepancy Type	The type of discrepancy in the receipt.
Discrepancy Quantity	The difference between the expected quantity and received quantity.
UOM	The unit of measure of the item.
Discrepancy Cost (\$)	The product of the unit cost of the item and the discrepancy quantity.

7.2 Inventory Prints

The following inventory prints can be generated using the Sterling Store Inventory Management:

- [Cycle Count Worksheet](#)
- [Cycle Count Variance](#)
- [Variance Details by Count Sheet](#)
- [Physical Count Variance Report](#)
- [Item Variance Details By Count Sheet](#)

7.2.1 Cycle Count Worksheet

The Cycle Count Worksheet lists all items that are pending count.

The default layout of the Cycle Count Worksheet is:

Store Address

CYCLE COUNT WORKSHEET								
XYZ_S2 1684, Langford Road Dallas 22045 VA US				Start Date 07/14/2006				
Count Sheet # 10000100								
Generated By xyzs2admin								
Item ID	Description	Location	Count Qty	UOM	Count Qty	UOM	OnHand Qty	UOM
KEYBOARD	Keyboard	DOCK					1000.00	EACH
Enter New Location Found for Items								
Item ID	Location	Count Qty	UOM	Count Qty	UOM			

Table 7-5 Cycle Count Worksheet

Field	Description
	This worksheet includes the store address, date on which the count sheet is printed, and the identifier of the user who generated the worksheet. In the count sheet number field, enter the count sheet number.
Item ID	The identifier of the item.
Description	The description of the item.
Location	The location of the item.
Count Qty	The item quantity that you physically counted.

Table 7-5 Cycle Count Worksheet

Field	Description
UOM	The unit of measure of the item.
Onhand Qty	The onhand quantity of the item.
Enter New Location Found for Items	
Item ID	The identifier of the item.
Location	The location of the item.
Count Qty	The item quantity that you physically counted.
UOM	The unit of measure of the item.

7.2.2 Cycle Count Variance

The Cycle Count Variance report provides cycle count variance information for a particular day.

The default format of the Cycle Count Variance report is:

Store Address

CYCLE COUNT VARIANCE						
XYZ_S2 1684, Langford Road Dallas 22045 VA US				Date 07/14/2006		
Item ID	Description	Location	Variance Qty	UOM	Variance Cost	Requested By
KEYBOARD	Keyboard	DOCK	-100.00	EACH	-5000.0	xyzs2admin
Total Variance is					\$ -5000.0	
Absolute Variance is					\$ 5000.0	

Table 7–6 Cycle Count Variance Report

Field	Description
	This report includes the address of the store and the date on which the report is printed.
Item ID	The identifier of the item.
Description	The description of the item.
Location	The location where the item is placed.
Variance Qty	Displays the variance quantity. Variance quantity is computed as the difference between on hand quantity and count quantity.
UOM	Unit of measure of the item.
Variance Cost	The product of the unit cost of the item and the absolute variance quantity.
Requested By	The identifier of the user who requested the variance report.
Total Variance is	The total variance cost.
Absolute Variance is	The absolute variance cost. Even if the variance cost is negative, the absolute variance cost is considered to be positive.

7.2.3 Variance Details by Count Sheet

The Variance Details by Count Sheet report provides variance information for a cycle count based on a particular item and location.

The default format of the Cycle Count Variance Report is:

Variance Details By Count Sheet						
ItemID	KEYBOARD	Description	Keyboard			
System Quantity	100 EACH					
Count Quantity	46 EACH					
Variance Quantity	-54 EACH					
Variance Value	-1620.00					
Variance at each location						
LocationId	DOCK	Count Sheet#	Count Sheet Line#	Count Quantity	UOM	User
System Quantity	100.00					
Count Quantity	46.00	1212	1	10.00	EACH	xyzs2admin
Variance Quantity	-54.00	1214	1	3.00	EACH	xyzs2admin
Variance Value	-1620.00	1218	1	33.00	EACH	xyzs2admin

Table 7-7 Variance Details by Count Sheet Report

Field	Description
Item ID	The identifier of the item.
System Quantity	The quantity of item recorded in the system.
Count Quantity	The actual quantity counted by the user.
Variance Quantity	The difference between the System Quantity and the Count Quantity.
Variance Value	The product of the unit cost of the item and the absolute variance cost.
Variance at each location	
Location ID	The identifier of the location where the items are stored.
System Quantity	The quantity of the item as recorded in the system.
Count Quantity	The actual quantity counted by the user.

Table 7–7 Variance Details by Count Sheet Report

Field	Description										
Variance Quantity	The difference between the System Quantity and the Count Quantity.										
Variance Value	The product of the unit cost of the item and the absolute variance quantity.										
<table border="1"> <tbody> <tr> <td>Count Sheet#</td> <td>The count sheet number.</td> </tr> <tr> <td>Count Sheet Line#</td> <td>The line number in the count sheet.</td> </tr> <tr> <td>Count Quantity</td> <td>The actual quantity counted by the user.</td> </tr> <tr> <td>UOM</td> <td>The unit of measure of the item.</td> </tr> <tr> <td>User</td> <td>The identifier of the user.</td> </tr> </tbody> </table>		Count Sheet#	The count sheet number.	Count Sheet Line#	The line number in the count sheet.	Count Quantity	The actual quantity counted by the user.	UOM	The unit of measure of the item.	User	The identifier of the user.
Count Sheet#	The count sheet number.										
Count Sheet Line#	The line number in the count sheet.										
Count Quantity	The actual quantity counted by the user.										
UOM	The unit of measure of the item.										
User	The identifier of the user.										

7.2.4 Physical Count Variance Report

The Physical Count Variance report provides the physical count variance information.

The default format of the Physical Count Variance Report is:


Variance Report								
XYZ_S3 1684, Langford Road Dallas 22046 VA US					Date 07/31/2006			
								
Items Found with Variance								
Item ID	Description	Onhand Quantity	Onhand Value(\$)	Count Quantity	Count Value(\$)	Variance Quantity	Variance Value(\$)	UOM
PC-CAM	PCCAMERA	40900.0	4090000.0	10000.0	1000000.0	10000.0	1000000.0	EACH
Items Found Missing								
Item ID	Description	Onhand Quantity	Onhand Value(\$)	UOM				
KEYBOARD	Keyboard	10000.0	500000.0	EACH				
LCD-17IN	17 inch LCD Monitor	10000.0	1000000.0	EACH				
MOUSE	Mouse	100.0	5000.0	EACH				
POWER-CHORD	2 Meters Power Chord	120.0	3600.0	EACH				
Items Found New								
Item ID	Description	Count Quantity	Count Value(\$)	UOM				
COMPUTER	Simple computer	40900.0	4090000.0	EACH				

Table 7–8 Variance Report

Field	Description
This report includes the address of the store and the date on which the report is generated.	
Items Found With Variance	
Item ID	The identifier of the item.
Description	The description of the item.
Onhand Quantity	The on hand quantity of the item.
Onhand Value	The product of the unit cost of the item and the onhand quantity.
Count Quantity	The actual quantity counted by the user.

Table 7–8 Variance Report

Field	Description
Count Value	The product of the unit cost of the item and the count quantity.
Variance Quantity	Variance quantity is computed as the difference between on hand quantity and count quantity.
Variance Value	The product of the unit cost of the item and the absolute variance quantity.
UOM	The unit of measure of the item.
Items Found Missing	
Item ID	The identifier of the item.
Description	The description of the item.
Onhand Quantity	The onhand quantity of the item.
Onhand Value	The product of the unit cost of the item and the onhand quantity.
UOM	The unit of measure of the item.
Items Found New	
Item ID	The identifier of the item.
Description	The description of the item.
Count Quantity	The actual quantity counted by the user.
Count Value	The product of the unit cost of the item and the count quantity.
UOM	The unit of measure of the item.

7.2.5 Item Variance Details By Count Sheet

The Item Variance Details Report gives you a detailed picture of the variance at location level.

The default format of the Item Variance Details Report is:

Item Variance Details By Count Sheet							
Item ID	KEYBOARD	Description	Keyboard				
System Quantity	100 EACH						
Count Quantity	46 EACH						
Variance Quantity	-54 EACH						
Variance Value	-1620.00						
Variance at each location							
Location ID	DOCK	Count Sheet #	Count Sheet Line #	Count Quantity	UOM	User	
System Quantity	100.00						
Count Quantity	46.00	1212		1	10.00	EACH	xyzs2admin
Variance Quantity	-54.00	1214		1	3.00	EACH	xyzs2admin
Variance Value	-1620.00	1218		1	33.00	EACH	xyzs2admin

Table 7-9 Item Variance Details By Count Sheet

Field	Description
Item ID	The identifier of the item.
Description	The description of the item.
System Quantity	The on hand quantity of the item.
Count Quantity	The actual quantity counted by the user.
Variance Quantity	Variance quantity is computed as the difference between on hand quantity and count quantity.
Variance Value	The product of the unit cost of the item and the absolute variance quantity.
Variance at each location	
Location ID	The identifier of the location.
System Quantity	The system quantity of the item in the location.
Count Quantity	The actual quantity counted by the user in the location.

Table 7–9 Item Variance Details By Count Sheet

Field	Description
Variance Quantity	Displays the variance quantity. Variance quantity is computed as the difference between on hand quantity and count quantity.
Variance Value	The product of the unit cost of the item and the absolute variance quantity.
Count Sheet #	The count sheet number.
Count Sheet Line #	The count sheet line number.
Count Quantity	The actual quantity counted by the user in the location.
UOM	The unit of measure of the item.
User	The identifier of the user who performed the count.

7.3 Outbound Prints

The following inventory prints can be generated using the Sterling Store Inventory Management:

- [Pick Ticket](#)
- [Bill Of Lading](#)

7.3.1 Pick Ticket

You can print the pick ticket for a back room pick.

The default pick ticket that the Sterling Store Inventory Management prints is:

Pick Ticket							
Date 08/10/2006				Page 1 of 1			
Order #		: 12345		Special Instruction			
Store Notified On		: 06/29/2006					
Customer Name		: John Smith					
Shipment #		: 100000001					
Line No.	Item	Description	Quantity	UOM	Location	Picked Quantity	UOM
1	MOUSE	Mouse	2.00	EACH	DOCK-494.00		
2	KEYBD	Keyboard	3.00	EACH	DOCK-133.00		

Table 7-10 Pick Ticket

Field	Description
	This report includes the date on which the pick ticket is printed.
Order #	The order number of the shipment.
Store Notified On	The date on which the store is notified of the shipment.
Customer Name	The name of the customer to whom the shipment is to be shipped.
Special Instruction	Enter appropriate information, if applicable.
Shipment #	The shipment number of the shipment.
Line No.	The line number.
Item	The identifier of the item.
Description	The item description.
Quantity	The quantity of the items in the location.
UOM	The unit of measure of the item.
Location	The location where the item is placed.

Table 7–10 Pick Ticket

Field	Description
Picked Quantity	Enter the picked quantity of items.
UOM	The unit of measure of the item.

7.3.2 Bill Of Lading

The Bill of Lading (BOL) is a document that provides inventory processing information through the supply chain to a carrier, customer, and shipper.

The default Bill of Lading generated using the Sterling Store Inventory Management is:

Table 7–11 Bill Of Lading for Shipment, SHIP FROM

Fields	
Name	The company that is shipping the product.
Address	The street address of the shipper.
City/State/ZIP	The city, state, and zip code of the shipper.
SID#	The shipment ID number applied by the shipper to this shipment.
FOB	Indicates the FOB freight term used for the shipment.
Bill of Lading Number	The bill of lading number created by the shipper to identify the shipment.

Table 7–12 Bill Of Lading for Shipment, SHIP TO

Fields	
Location #	The location number assigned to the ship to address of the consignee.
Name	The company where the product has to shipped.
Address	The address of the company.
City/State/ZIP	The city, state, and zip code of the company.
CID#	The consignee ID number applied by the consignee to this shipment.
FOB	Indicates the FOB freight term used for the shipment.
CARRIER NAME	The carrier picking up the shipment.
Trailer number	The trailer number of the shipment. The trailer number is used if the truckload carrier hauls the shipment.

Table 7–12 Bill Of Lading for Shipment, SHIP TO

Fields	
Seal numbers	The seal number of the shipment. The seal number is used if the shipment is full truckload from the origin to destination.
SCAC	The Standard Carrier Alpha Code (SCAC) assigned to identify the carrier.
Pro number	The Pro number assigned by the carrier to track the shipment. The pro number is used if an LTL carrier hauls the shipment.

Table 7–13 Bill Of Lading for Shipment, THIRD PARTY FREIGHT CHARGES BILL TO

Fields	
Name	The third party to whom the charges are billed, if applicable.
Address	The address of the third party.
City/State/ZIP	The city, state, and zip code of the third party.
SPECIAL INSTRUCTIONS	Special instructions associated with the carrier. For example, appointment number, date and delivery instructions. Note: Only 4 underlying BOL numbers are printed.
Freight Charge Terms	Indicates which third party is invoiced and is responsible for payment of the freight invoice.
Prepaid	The prepaid charges for the freight paid by the shipper from origin to the consignee's dock.
Collect	The charges collected for the freight from the consignee from origin to the dock of the consignee.

Table 7–13 Bill Of Lading for Shipment, THIRD PARTY FREIGHT CHARGES BILL TO

Fields	
3rd Party	The freight charges paid by the third party from the origin to the dock of the consignee.
Master Bill of Lading	Indicates whether a BOL is attached.

Table 7–14 Bill Of Lading for Shipment, CUSTOMER ORDER INFORMATION

Fields	
CUSTOMER ORDER NUMBER	The number generated by the customer to identify the order.
CUST# PKGS	The number of individual packages or cartons on the shipment that has quantity associated with the customer order.
WEIGHT	The weight associated with the CUST# PKGS.
PALLET	Indicates if the product is shipped as pallets.
ADDITIONAL SHIPPER INFO	Any additional information about the customer order, if any.
GRAND TOTAL	The grand total and weight across all customer orders.

Table 7–15 Bill Of Lading for Shipment, CARRIER INFORMATION

Fields	
HANDLING UNIT	
QTY	The quantity associated with the type of package being handled. This refers to the pallet or carton being shipped.
TYPE	The type of handling unit. For example, pallets or cartons.

Table 7-15 Bill Of Lading for Shipment, CARRIER INFORMATION

Fields	
PACKAGE	
QTY	The number of packages in the handling unit. This refers to number of cartons in a pallet (handling unit) or number of units in a carton (handling unit).
TYPE	The unit type associated with the package. For example, cartons in a pallet or units (EACH) in a carton.
WEIGHT	The weight associated with the package quantity.
H.M (X)	Indicates if there is any hazardous material (HM) in the package.
LTL ONLY	
NMFC #	The National Motor Freight Classification (NMFC) number associated with the commodity classification.
CLASS	The freight class associated with the commodity classification.
COD Amount	The amount to be collected when shipment is delivered, referred to as COD - Collect (Cash) on Delivery.
Fee Terms	The fee terms associated with the shipment. For example, collect or prepaid.
Customer check acceptable	Indicates if checks are accepted for collect or COD shipments.

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