

ORDER POWER!

Order Interface

User Guide

Release 3.3.2



**Computer
Solutions,
Inc.**

February 6, 2001

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Computer Solutions, Inc. 1991-1999

Order Interface

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Order Interface

Outside call centers and internet sites create the need to easily import order from external sources. **ORDER POWER!** order interface creates the customer and order information while insuring the accuracy of pricing, taxation and methods of payment.

ORDER POWER! allows you great flexibility and control over orders you import into the system. All imported orders are subject to the same quality controls as orders you input directly into **Order Entry**. New customer and mail list records are created only when **ORDER POWER!** has verified that the name does not already exist on file. Any required information missing from the transfer file is supplied automatically by an **Order Interface Profile** designed by you.

Steps to process Orders from an external source

- | | |
|---|--------------------|
| 1. Create an Order Interface Company Profile (You perform this step only one time for each customer or vendor who will provide the order files.) | <i>see page 2</i> |
| 2. Upload a transfer file | <i>see page 7</i> |
| 3. Import/Edit/Post Imported Orders from Work File | <i>see page 8</i> |
| 4. Maintain Imported Orders in Error Status | <i>see page 20</i> |
| 5. Post Imported Orders | <i>see page 33</i> |

Which orders are not supported?

Order Interface does not presently support importing the following types of orders. (Create these orders manually, using the **Order Entry** option from the **Main Menu**.)

- **Assortments**
- **Return Authorizations**
 - **Deal Items** - If an item or coupon has a deal item associated with it the interface will not add it to the order. It must be supplied in the order upload.
- **Bid Orders**

These types of closed orders (**Counter Sales**) are not supported:

- **Drop Ships**
- **Replenishments**
- **Continuities**

Order Interface Company Profile

Order Interface Company Profile maintains a file of default values that you can assign to required **ORDER POWER!** fields when creating orders you have imported from an external source, such as call centers or the Internet.

The default values are defined uniquely for each customer and vendor. When the external information is mapped to **ORDER POWER!** files, these defaults are used to populate fields required by **ORDER POWER!** that were omitted from the incoming file. After the records are populated with incoming file information and/or the **Order Interface Company Profile** default values, new orders are created.

To work with Order Interface profiles

From the **ORDER POWER! Main Menu**, select: **Work with Files → Order Interface Company Profile** to display the *Order Interface Company Inquiry panel (figure 1)*.

Opt	Type	Call Center	Call Center Name	Del
—	V	1	Kreidman	
—	V	2	Eden Publishers	
—	C	3	MR HARRISON A RYAN JR	
—	V	4	whatever Product Supply	
—	V	10	wilson	
—	C	34	M VANDERBULITWALLA	
—	C	42	DR EDDIE SOTO	
—	V	56	AOL	
—	C	83	MR GLEN MORRISON	
—	V	100	ABC Supplies of Miami Beach Co	
—	C	109	WILLIAM BLACK	
—	C	117	CSI	
—	C	141	Ms Louise Andrews	
—	V	250	AOL	
—	C	257	Ms Harriet Smithson	

CSI 3.3 Development Co 1 **
Order Interface Company Inquiry **Show Delete: N**
 2=Change 5=Display
 F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top F12=Cancel F18=Bot F21=Print
 More...

Order Interface Company Inquiry panel (figure 1)

These actions are available, in addition to the standard **ORDER POWER!** functions:

Action	Description
2=Change	Display <i>Order Interface Company Update panel 1 (figure 3)</i> to update the Interface Profile
5=Display	Display the <i>Order Interface Company Display window (figure 5)</i> to view the Interface Profile
F6=Create	Display the <i>Order Interface Company Update prompt panel (figure 2)</i> to create a new Interface Profile

To create a new Order Interface Profile

1. On the *Order Interface Company Inquiry panel (figure 1)*, press **F6** (Create) to display the *Order Interface Company Update prompt panel (figure 2)*.

1	<p>** CSI 3.3 Development Co 1 ** Order Interface Company Update</p> <p>Import Ref Type: _ 'V'endor/'C'ustomer ?Call Center:</p>
F1=Help F3=Exit F4=?List F12=Cancel	

Order Interface Company Update prompt panel (figure 2)

1a. Complete these fields:

Import Ref Type (required)

Type a code to indicate whether this profile is being created for an **ORDER POWER!** customer or vendor:

- C Customer
- V Vendor

?Call Center(required)

Type a **Customer** or **Vendor** number to indicate the source of the orders you will import using this profile, or press **F4** to select one from a list.

(ORDER POWER! displays either a list of **Customers** or **Vendors**, depending on what you entered in the **Import Ref Type** field above.)

To change an Order Interface Profile

1. On the *Order Interface Company Inquiry panel (figure 1)*, type **2** (Change) beside the profile you want to change.
2. Press **Enter** to display the *Order Interface Company Update panel 1 (figure 3)*.

```

** CSI 3.3 Development Co 1 **
Order Interface Company Update

1 C
Call Center          9473 CSI's Favorite Customer
Tech Contact        Marv Smith
Telephone           305-558-7000 Fax: 305-557-0003
Calc Method         ?Tax1 N ?Tax2 N ?S/H N ?Disc N ?Misc1 N ?Misc2 N
Auto Post Closed Order N Y/N
Defaults:
?Customer Class    WEB      Internet Customer      N Y/N
?Order Origin      WEB      Retail Website         N Y/N
?Original Media    W12     web                    Y Y/N
?Priority Code      _____ N Y/N
?Salesperson 1    CSUSER   _____            Y Y/N
?Salesperson 2    _____ N Y/N
Ship Complete
?Ship Via          UPS      UPS Ground             N Y/N
?Warehouse        MIA     Miami warehouse       N Y/N
?Header Comment Code WRT     Hdr1                   IFC NOTE 1   Y Y/N
?Detail Comment Code WRT     Hdr2                   IFC NOTE 2   Y Y/N
Accept Pick Ticket Code N Y/N   Hdr3                   IFC NOTE 3   Y Y/N
Delete

F1=Help F3=Exit F4=?List F12=Cancel

```

Order Interface Company Update panel 1 (figure 3)

3. Complete these fields:

Tech Contact

Type the name of the person at the **Call Center** responsible for dealing with sending orders to **ORDER POWER!**.

Telephone

Type a phone number for the **Tech Contact**.

Fax

Type a fax number for the **Tech Contact**.

Calc Method

?Tax1 ?Tax2 ?S/H ?Disc ?Misc1 ?Misc2

Type a code to indicate to what extent, if any, **ORDER POWER!** should verify Taxes, Shipping and Handling, Discounts and Miscellaneous charges.

Y **ORDER POWER!** calculates the charge and overrides any charges that were uploaded

N **ORDER POWER!** accepts the upload without performing any verification

F **ORDER POWER!** calculates the charge and verifies that the uploaded charge is an exact match. If it is not, **ORDER POWER!** reports an error on the Order Interface Edit report.

Auto Post Closed Order

Type **Y** or **N** to indicate whether you want **ORDER POWER!** to automatically post **Counter Sales** orders to **Accounts Receivable**.

Y (yes) post **Counter Sales** orders with all other imported orders

N (no) do not post **Counter Sales** orders with all other imported orders. (You must then run the **Post Counter Sales** option in **Accounts Receivable** to post these orders.)

4. For each of the default fields, type a value that **ORDER POWER!** can use to populate required fields if the information is omitted in the incoming file. For each default,

complete the **Override** field (on the right side of the panel) to determine whether the default value you enter should override the information you upload with the order.

Default: ?Customer Class

Type a customer class code that identifies a group or type of customer (wholesale, consumer, or government agency, etc.). Customer classes frequently have pricing significance. For example, item pricing, shipping and handling calculation methods, and applicable discounts may be determined according to customer class.

Default: ?Order Origin

Type a user-defined code to indicate how an order was received (i.e. telephone , mail, fax, etc.). **ORDER POWER!** provides statistics on orders by order origin.

Default: ?Original Media

Type the media code to assign to new customers.

Default: ?Priority Code

Type a user-defined code that assigns relative importance to order release. Orders can be released by selected priority codes.

Default: ?Salesperson 1

Default: ?Salesperson 2

Type the names of the primary and secondary Salespeople.

Default: Ship Complete

Type **Y** or **N** to indicate whether an order should be held until all items are available.

Y (yes) hold if not complete

N (no) partial shipment is allowed

Default: ?Ship Via

Type a user-defined code to specify a required carrier and method of shipment (for example, UPS Ground, FedEx Next Day, etc.).

Default: ?Warehouse

Type a user-defined code to specify an inventory storage area. This may be either a physical or logical warehouse.

?Header Comment Code

Type user-defined alphanumeric code that you want to assign to the header note.

?Detail Comment Code

Type user-defined alphanumeric code that you want to assign to the detail line note.

Accept Pick Ticket Code

Type **Y** or **N** to indicate whether you want to accept the **Pick Ticket Code** that is imported with each order.

Y (yes) accept the **Pick Ticket Code**

N (no) do not accept the **Pick Ticket Code**

Info fields 1, 2, 3

Type the text you want to populate these 10-character user-defined fields.

- Press **Enter** to display the *Order Interface Company Update mapping panel* (figure 4).

```

** CSI 3.3 Development Co 1 **
Order Interface Company Update

1 C
Call Center                9473  CSI's Favorite Customer

                          File 1          File 2

Import from PC Folder
Import from PC Document
Import to Physical File Name
Mapping Program

                          Secondary Mail List Criteria
                          (Enter # of characters to use)

Last Name...(10)  _____  Addr 1.....(30)  _____  Phone 1.....(10)
Full Name...(30)  _____  Addr 2.....(30)  _____  Phone 2.....(10)
Company.....(30)  _____  Addr 3.....(30)  _____
Title/Pos  (30)  _____  City.....(20)
                          State.....( 2)  _____  Country.....( 2)
                          Zip Code....(10)

F1=Help  F3=Exit  F12=Cancel

```

Order Interface Company Update mapping panel (figure 4)

Because the order file can originate in any format (such as PC, UNIX, Macintosh), a custom program is normally needed to create a format that can be used by **Order Interface**. To do so, you must move the PC file to an intermediate AS/400 file before it can be mapped to the **Order Interface** order file, WORDER. The fields in this intermediate file must be a mirror image of the fields in the PC document (see “Order file: WORDER” on page 36).

- The **PC Mapping** fields are used to specify the location of the file you want to import, and the mapping program to use. Complete these fields:

Import from PC Folder

File 1/File 2

Type the name of the folder which contains the PC document that contains the orders.

Import from PC Document

File 1/File 2

Type the name of the PC document (the order file) you want to import.

Import to Physical File Name

File 1/File 2

Type the name of AS/400 intermediary file (see above) where the orders will be copied before mapping them to the **Order Interface** file, WORDER.

Mapping Program

Type the name of the mapping program or CL for **Order Interface** to use to map the PC order file to the AS/400 order file.

ORDER POWER!'s matchcode process compares the names and addresses of customers in the imported order file to existing customers in your **ORDER POWER!** company to prevent duplication. **ORDER POWER!** determines a duplicate or match by creating a **Match Code**.

The **Match Code** consists of ZZZZZAANN where,

- ZZZZZ** represents the five digits of the customer's zip code
- AA** represents the first two characters of the customer's address
- NN** represents the first two characters of the customers last name

If a match is found, the existing customer number is used for the order. The **Secondary Mail List Criteria** fields provide additional protection against duplicate customer records by checking the number of characters you specify in these fields.

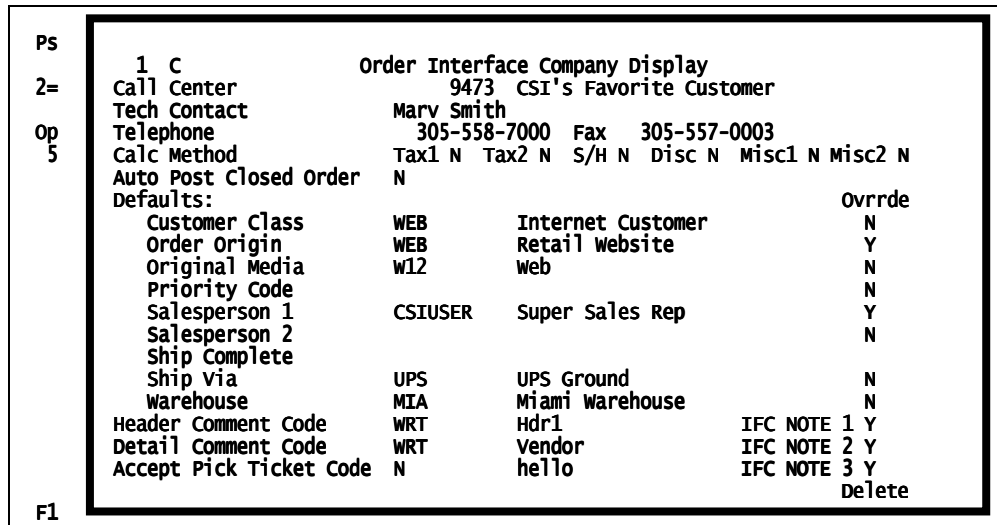
Last Name	Full Name	Company	Title/Pos	Addr 1
Addr 2	Addr 3	City	State	Zip Code
Phone 1	Phone 2	Country		

Type the number of characters to check for in each field. The numbers in parentheses indicate the maximum size of each one.

4. Press **Enter** to update the **Order Interface Profile**.

To display an Order Interface Profile

On the *Order Interface Company Inquiry panel (figure 1)*, type **5** (Display) beside the profile you want to see, then press **Enter** to display the *Order Interface Company Display window (figure 5)*.



Order Interface Company Display window (figure 5)

Upload a transfer file

Depending on the source of the order file, there are many ways to move that file to an accessible location on the AS/400. This decision should be made by your company's System Administrator prior to the implementation of **Order Interface**.

Import/Edit/Post Imported Orders from Work File

After you have placed the PC file in its folder on the AS/400, you can import these orders into **ORDER POWER!**.

To import orders

From the **ORDER POWER! Main Menu**, select: **Order Processing** → **Import/Edit/Post Imported Orders from Work File** to display the *Import/Edit/Post Imported Orders from Work File panel 1* (figure 6).

```
1          ** CSI 3.3 Development Co 1 **
          Import/Edit/Post Imported Orders from work File

Import Ref Type W 'v'endor/'C'ustomer/'w'eb
?Import Ref #... 9473 CSI's Favorite Customer
Order Date..... 8/05/99
Batch #..... 23970
Deposit Number. 080599

F1=Help F3=Exit F4=?List
```

Import/Edit/Post Imported Orders from Work File panel 1 (figure 6)

2. Complete these fields:

Import Ref Type (required)

Type a code to indicate whether these orders are coming from a **Customer** or a **Vendor**:

- C Customer
- V Vendor
- W Web

?Import Ref # (required)

Type a **Customer** or **Vendor** number that you have previously set up as a **Call Center** in a **Order Interface Profile**.

Order Date

Type the date you want as the order date on the orders you are importing. The default date is the current date.

Batch

Type a **Batch Number** (or name) to group and identify the orders during **Order Interface**, or accept the number shown. Depending on the defaults you selected in the **Company Profile**, a **Batch Number** can be assigned automatically by **ORDER POWER!** or manually in this field.

Deposit Number

Type a number to identify given to a group of payment records in AR. This

number may be used to indicate a specific bank deposit slip. If you don't enter an identifier, **ORDER POWER!** uses the system date.

3. Press **Enter** to display *Import/Edit/Post Imported Orders from Work File panel 2* (figure 7).

```

** CSI 3.3 Development Co 1 **
Import/Edit/Post Imported Orders from Work File
1 C
9473 CSI's Favorite Customer
?Customer Class..... WEB      Internet Customer      Override
?Order Origin..... WEB      Retail Website         N Y/N
?Original Media..... MH1984
?Priority Code.....
?Salesperson 1.....
?Salesperson 2.....
Ship Complete..... N Y/N
?Ship Via..... UPS      UPS Ground             N Y/N
?Warehouse..... MIA      Miami Warehouse        N Y/N
Info1
Info2
Info3
Accept Pick Ticket Code... N Y/N
Run Upload and Mapping... N Y/N
Use Current Print Defaults Y Y/N
Submit to Batch..... N Y/N
F1=Help F3=Exit F4=?List F12=Cancel

```

Import/Edit/Post Imported Orders from Work File panel 2 (figure 7)

Many of these fields contain the information you specified when you set up the **Order Profile** (see “Order Interface Company Profile” on page 2). If you enter information on this panel that does not match what you entered in the profile, this information will override the profile (for the current batch only).



Here's an example of how the overrides work:

If you enter **Customer Class** “ABC” and **Override** “Y” for that field, all orders in that batch will have **Customer Class** “ABC,” regardless of what is in the upload.

If you enter **Override** “N” for that field, only orders where the **Customer Class** field was blank will be assigned code “ABC.”

4. Complete these fields. Where it is applicable, complete the **Override** field (on the right side of the panel) to determine whether the value you enter on this panel should override the information you upload with the order:

?Customer Class

Type a customer class code that identifies a group or type of customer (wholesale, consumer, or government agency, etc.). Customer classes frequently have pricing significance. For example, item pricing, shipping and handling calculation methods, and applicable discounts may be determined according to customer class.

?Order Origin

Type a user-defined code to indicate how an order was received (i.e. telephone, mail, fax, etc.). **ORDER POWER!** provides statistics on orders by order origin.

?Original Media

Type the media code to assign to new customers.

?Priority Code

Type a user-defined code that assigns relative importance to order release. Orders can be released by selected priority codes.

?Salesperson 1**?Salesperson 2**

Type the names of the primary and secondary Salespeople.

Ship Complete

Type **Y** or **N** to indicate whether an order should be held until all items are available.

Y (yes) hold if not complete

N (no) partial shipment is allowed

?Ship Via

Type a user-defined code to specify a required carrier and method of shipment (for example, UPS Ground, FedEx Next Day, etc.).

?Warehouse

Type a user-defined code to specify an inventory storage area. This may be either a physical or logical warehouse.

Info1/Info2/Info3

Type the text you want to populate these 10-character user-defined fields.

Accept Pick Ticket Code

Type **Y** or **N** to indicate whether you want to accept the **Pick Ticket Code** that is imported with each order.

Y (yes) accept the **Pick Ticket Code**

N (no) do not accept the **Pick Ticket Code**

Run Upload and Mapping

Type **Y** or **N** to indicate whether **Order Interface** should use instructions you entered on the *Order Interface Company Update mapping panel (figure 4)*.

Y (yes) upload and map the specified file to **WORDER**

N (no) display the *Import / Mapping Confirmation window (figure 8)* to change the instructions specified in the **Order Interface Profile**

Use Current Print Defaults

Type a code to indicate whether to change the existing printer defaults for the current report.

Y (yes) accept the existing printer defaults

N (no) display the *Printer Defaults panel* to make changes the current printer defaults

Submit to Batch

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

Y (yes) indicates that the report will be submitted as a batch job

N (no) indicates that the report will be run interactively

5. Press **Enter**. If you typed **N** on the **Run Upload and Mapping** field above, **Order Interface** imports the orders using the information you entered on *Order Interface Company Update mapping panel* (figure 4).

If you typed **Y** on the **Run Upload and Mapping** field, **ORDER POWER!** displays the *Import / Mapping Confirmation window* (figure 8).

```

** CSI 3.3 Development Co 1 **
Import/Edit/Post Imported Orders from work File
1 V
1000000 sam's wines & spirits #1
?Customer Class..... RET      Retail      Override
?Order Orig
?Original M
?Priority C
?Salesperso
?Salesperso
Ship Compl
?Ship Via..
?warehouse.
Hdr1
Vendor
hello
Accept Pic
Run Upload
Use Curren
Submit to
F1=Help F

```

Import / Mapping Confirmation

You are about to run the Import Process which will take your "raw" PC or AS/400 file and merge it with any existing data in the standard ORDER POWER! order import files.

	Import File 1	Import File 2
Import from PC Folder	<u>SAMS</u>	<u>SAMS</u>
from PC Document	<u>EJSALES.TXT</u>	<u>EJDETAIL.TXT</u>
Import to Physical File	<u>EJSALE</u>	<u>EJDETL</u>
Mapping Program	<u>CS01505C</u>	
F3/F12=Cancel, Do Not Run	ENTER = Run Import	

Import / Mapping Confirmation window (figure 8)

6. Many of these fields contain the information you specified when you set up the **Order Profile** (see "Order Interface Company Profile" on page 2). If you enter information on this panel than does not match what you entered in the profile, this information will override the profile (for the current batch only). Complete these fields if needed:

Import from PC Folder

File 1/File 2

Type the name of the folder which contains the PC document that contains the orders.

Import from PC Document

File 1/File 2

Type the name of the PC document (the order file) you want to import.

Import to Physical File Name

File 1/File 2

Type the name of AS/400 intermediary file (see the explanation on page 6) where the orders will be copied before mapping them to the **Order Interface** file, **WORDER**.

Mapping Program

Type the name of the mapping program or CL for **Order Interface** to use to map the PC order file to the AS/400 order file.

7. Press **Enter** to import the orders using the information you entered.

Reports created by importing orders

After you run the Import/Edit/Post Imported Orders from Work File option, **ORDER POWER!** prints some or all of the following reports, depending on if certain errors are found to exist:

- Inquiry Customer Import Summary *see page 13*
This report lists the number of Inquiry customers included in the imported file. Inquiry customers are those who have expressed an interest without placing an order.
- Order Interface Posting Report - Orders *see page 14*
This report lists the number of orders successfully created in **ORDER POWER!**. This refers to records that were processed completely without errors. The **ORDER POWER!** order numbers are listed on the report.
- Order Interface Posting Report - Counter Sales *see page 15*
This report lists the number of counter sales orders successfully created in **ORDER POWER!**. This refers to records that were processed completely without errors. The **ORDER POWER!** order numbers (if any) are listed on the report.
- GL Summary for Inventory Transactions *see page 16*
This listing of GL transactions is only printed when you post **Closed** orders (**Counter Sales**).
- Order Interface Edit *see page 17*
This report lists the imported records containing errors. These orders are not created in **ORDER POWER!**, and cannot be viewed or modified other than using the Maintain Imported Orders in Error Status option (see page 20).
- Assortment Items Not Created *see page 18*
ORDER POWER! does not presently support importing order for **Assortment Items**. These order will reflect as errors on this report. Create these orders manually, using the **Order Entry** option from the **Main Menu**.
- Number of Orders Created Report *see page 19*
This report lists the number of orders included in the imported file. This excludes Inquiry customers (those who have expressed an interest without placing an order).

Inquiry Customer Import Summary

Page: 1
Date: 8/06/99
Time: 11:46:10

User: CSIUSER
Wsid: DSP108SI
Prog: OI01503P Inquiry Customer Import Summary
Batch Processed: 24073
Total Inquiry Customers Received. 3
0 Total moved to import files
3 Total Duplicates found
0 Total Updates found
0 Total Update Errors found

Order Interface Posting Report - Orders

Page: 1
Date: 8/06/99
Time: 11:48:13

** Computer Solutions, Inc. **

User: CSUSER
Wsid: DSP108SI
Prog: OI01501P Order Interface Posting Report - Orders
Batch # Record # OP! Order #
24073 1 57258
24073 6 57259
Total New Orders Created = 2

Order Interface Posting Report - Counter Sales

Page: 1
Date: 8/06/99
Time: 11:48:34

** Computer Solutions, Inc. **

User: CSUSER
Wsid: DSP108SI
Prog: OI01501P Order Interface Posting Report - Counter Sales
Batch # Record # OP! Order #
**** No New Orders Created ****

GL Summary for Inventory Transactions

Page: 1
Date: 8/06/99
Time: 11:48:46

User: CSUSER
Wsid: DSP108SI
Prog: IN01500

GL Summary for Inventory Transactions

Account #	Debit	Credit	JV#
001-000-00110		6147.08	
001-111-00119	3000.00		
001-111-00441		45.00	
001-200-20000	6000.00		
001-333-00445		3000.00	
001-999-00236	192.08		

Order Interface Edit

Page: 1
Date: 8/06/99
Time: 11:46:12

User: CSIUSER
Wsid: DSP108S1
Prog: OI01005
Batch# 24073

** Computer Solutions, Inc. **
Order Interface Edit

Record # 1 Errors:
**** This order contains possible fraudulent information.
**** No Errors Found.

Record # 2 Errors:
**** Header salesperson 1 Z99 is invalid.

Record # 3 Errors:
**** Header salesperson 1 Z99 is invalid.
**** Amount tendered = 0, header tender requires an amount tendered.

Record # 4 Errors:
**** Header salesperson 1 Z99 is invalid.

Record # 5 Errors:
**** This order contains possible fraudulent information.

Record # 6 Errors:
**** Header salesperson 1 Z99 is invalid.
**** Line 002 Discount 0000000.0425 Greater than Charges 0000001.4800
**** Line 002 can not have total dollars less than 0.

Record # 7 Errors:
**** This order contains possible fraudulent information.
**** No Errors Found.

Record # 8 Errors:
**** Header salesperson 1 Z99 is invalid.

Record # 9 Errors:
**** Header salesperson 1 Z99 is invalid.

Record # 10 Errors:
**** Header salesperson 1 Z99 is invalid.

Record # 11 Errors:
**** Ship complete is not allowed for this order.
**** Header salesperson 1 Z99 is invalid.

Record # 12 Errors:
**** Header salesperson 1 Z99 is invalid.

Record # 13 Errors:
**** Header salesperson 1 Z99 is invalid.

Record # 14 Errors:
**** Amount tendered = 0, header tender requires an amount tendered.
**** Header tender expiration date is invalid.

Record # 15 Errors:
**** Header salesperson 1 Z99 is invalid.

Assortment Items Not Created

Page: 1
Date: 8/06/99
Time: 11:45:59

** Computer Solutions, Inc. **

User: CSUSER
Wsid: DSP108S1
Prog: OI010011 Assortment Items Not Created
Batch # Original Order # Item #

Number of Orders Created Report

Page: 1
Date: 8/06/99
Time: 11:45:59

** Computer Solutions, Inc. **

User: CSUSER
Wsid: DSP108SI
Prog: OI01001P Number of Orders Created
Total New Orders Received for Batch # 24073 = 19

Maintain Imported Orders in Error Status

If there are errors in the batch of orders that you imported, it is necessary to correct the errors or add omitted information before the orders can be processed by **ORDER POWER!**. The reports **ORDER POWER!** generates (see page 12) when you run the Import/Edit/Post Imported Orders from Work File option provide detailed information about the corrections needed.

To work with imported orders

From the **ORDER POWER! Main Menu**, select: **Order Processing → Maintain Imported Orders in Error Status** to display the *Order Interface Header Inquiry panel* (figure 9).

```

Position: Batch# _____      ** CSI 3.3 Development Co 1 **
Record # _____      Order Interface Header Inquiry

2=Change 4=Delete 5=Display 6=Detail 7=Addtl Pymnts 8=Coupons
Opt  Batch #  Record #  Customer Name  Status
-   24073      2  Kate Simon      Errors
-   24073      3  TODD REYNOLDS  Errors
-   24073 CR    4  ELLIOTT WINSTEL Errors
-   24073      5  Jolly Rogers    Errors
-   24073      7  Jolly Rogers    Errors
-   24073      8  Jolly Rogers    Errors
-   24073      9  Kate Simon      Errors
-   24073     10  TODD REYNOLDS  Errors
-   24073     11  JOSE ARCE      Errors
-   24073     12  JOSE ARCE      Errors
-   24073     13  BEATRICE JACOBS Errors
-   24073     14  VIRGINIA PEREZ Errors
-   24073 CR    15  DAVID DAHLBERG Errors
-   24073     16  JOSEPHINE MOHLER Errors
-   24073     17  Joan Legstrong  Errors
                                     More...
F1=Help F3=Exit F7=Bkwd F8=Fwd F10=Top F12=Cancel F15=All Detl F18=Bot

```

Order Interface Header Inquiry panel (figure 9)

These actions are available, in addition to the standard **ORDER POWER!** functions:

Action	Description
2=Change	Display <i>Order Interface Header Record Panel 1</i> (figure 10) and <i>Order Interface Header Record Panel 2</i> (figure 11) to update the order header.
4=Delete	Display the <i>Header record delete confirmation window</i> (figure 12) to confirm deletion of the selected order.
5=Display	Display <i>Order Interface Header Record display window 1</i> (figure 13) and <i>Order Interface Header Record display window 2</i> (figure 14) to view the order header.
6=Detail	Display the <i>Order Interface Detail Inquiry panel</i> (figure 15) to work with lines on the order.

...continued on the next page

Action	Description
7=Addtl Pymnts	Display the <i>Imported Additional Payments Inquiry</i> window (figure 22) to work with Additional Payments .
8=Coupons	Display the <i>Order Interface Coupon Inquiry</i> window (figure 25) to work with Coupons .
F15=All Dtl	Display the <i>Order Interface Detail Inquiry</i> panel (figure 28)

To change the order header

1. Refer to Order Interface Edit report (see page 17) to determine why the order is in error status.
2. On the *Order Interface Header Inquiry* panel (figure 9), type **2** (Change) beside the order you want to work with, then press **Enter** to display the *Order Interface Header Record Panel 1* (figure 10).

Order Interface Header Record Panel 1		Errors Found	
Batch #	24073		
Record #	2		
Order Date	<u>6/18/99</u>	Credit Memo	N Y/N
Requested Ship Date	<u>6/18/99</u>		
Order Customer	2 Kate Simon		Exists in OP!
Bill to Customer	2 Kate Simon		Exists in OP!
?Tender	AR Accts. Receivable		
Tender #		Exp	Bank
?Terms	<u>N30</u> Net 30 days		
?Customer Class	<u>EMP</u> Employees	Hdr1	<u>Hdr 1</u>
?Order Origin	<u>PHO</u> Phone	Vendor	<u>Hdr 2</u>
?Priority Code		hello	<u>Hdr 3</u>
Hold	N Y/N ?Hold Code		
PO #	<u>PO number</u>		
?Media	<u>MISC</u> Miscellaneous Media Code		
?Salesperson(s)	<u>Z99</u> <u>CSIUSER</u>		
F1=Help F3=Exit F4=Prompt F8=Order By Cust F9=Bill to Cust F12=Cancel			

Order Interface Header Record Panel 1 (figure 10)

3. Change the appropriate information, then press **Enter** to display *Order Interface Header Record Panel 2* (figure 11).

```

Order Interface Header Record Panel 2      Errors Found
Batch # 24073
Record # 10
Closed Order N Y/N      Ship Complete Y Y/N
MICR #
MICR Check #
Calc Method   ?Tax1 N ?Tax2 N ?S/H N ?Disc N ?Misc1 N ?Misc2 N
----- Totals -----
Merchandise      302.47
Shipping & Handling  12.50
Tender Miscellaneous
Item Miscellaneous
Discount
Sales Tax 1
Sales Tax 2
OE Tendered
F1=Help  F3=Exit  F12=Cancel

```

Order Interface Header Record Panel 2 (figure 11)

4. Change the appropriate information, then press **Enter** to update the order.

To delete an order

1. On the *Order Interface Header Inquiry* panel (figure 9), type 4 (Delete) beside the order you want to delete to display the *Header record delete confirmation window* (figure 12).

```

Position: Batch#      ** CSI 3.3 Development Co 1 **
Record #              Order Interface Header Inquiry

2=Change 4=Delete 5=Display 6=Detail 7=Addtl Pymnts 8=Coupons
Opt Batch # Record # Customer Name      Status
4  24073
-  24073
-  24073 CR
-  24073
-  24073
-  24073
-  24073
-  24073
-  24073
-  24073
-  24073
-  24073
-  24073
-  24073 CR
-  24073
-  24073
-  24073
-  24073
-  14 VIRGINIA PEREZ
-  15 DAVID DAHLBERG
-  16 JOSEPHINE MOHLER
-  17 Joan Legstrong
-                               More...
F1=Help  F3=Exit  F7=Bkwd  F8=Fwd  F10=Top  F12=Cancel  F15=All  Detl  F18=Bot

```

Warning!

Are you sure you wish to delete this header record? N

F1=Help F3=Exit F12=Cancel

Header record delete confirmation window (figure 12)

2. Type **Y** in the delete confirmation window, then press **Enter** to delete the header record. (All line items are deleted too.)

To display an order header

1. On the *Order Interface Header Inquiry* panel (figure 9), type 5 (Display) beside the order you want to see, then press **Enter** to display *Order Interface Header Record display window 1* (figure 13).

```

P
  2      Order Interface Header Record Panel 1      Errors
  Order Date 6/18/99
  Requested Ship 6/18/99
  Order Customer 2 Kate Simon
  Bill to Customer 2 Kate Simon
  Tender / # AR
  Preauthorization Pre-Approved by OE
  Authorization
  Terms N30
  Customer Class EMP
  Order Origin PHO
  Priority Code
  Hold N Y/N
  Hold Code
  PO # PO number
  Media MISC
  Salesperson(s) Z99      CSIUUSER
  Exp Dec1
  Bank Date 6/18/99
  Date 0/00/00
  Hdr1
  Vendor Hdr 1
  hello Hdr 2
  Hdr 3
  F1=Help F3=Exit F12=Cancel
  
```

Order Interface Header Record display window 1 (figure 13)

2. Press **Enter** again to display *Order Interface Header Record display window 2* (figure 14).

```

P
  11      Order Interface Header Record Panel 2      Errors
  Closed Order N Y/N
  Ship Complete Y Y/N
  MICR #
  MICR Check # 000000
  Calc Method Tax1 Y Tax2 Y S/H Y Disc Y Misc1 Y Misc2 Y
  ----- Totals -----
  Merchandise 129.97
  Shipping & Handling 3.24
  Tender Miscellaneous
  Item Miscellaneous
  Discount
  Sales Tax 1
  Sales Tax 2
  OE Tendered 67.47
  F1=Help F3=Exit F12=Cancel
  
```

Order Interface Header Record display window 2 (figure 14)

To work with order details (detail lines)

On the *Order Interface Header Inquiry panel* (figure 9), type **6** (Detail) beside the order you want to see details of, then press **Enter** to display the *Order Interface Detail Inquiry panel* (figure 15).

** CSI 3.3 Development Co 1 **				
Order Interface Detail Inquiry				
2=Change 4=Delete 5=Display 6=Gift Certificate				
Opt	Batch#	Record #	Line #	Status
-	24073	3	1	Errors
-	24073	3	2	Unedited
-	24073	3	3	Unedited

Bottom

F1=Help F3=Exit F7=Bkwd F8=Fwd F10=Top F12=Cancel F15=Header F18=Bot

Order Interface Detail Inquiry panel (figure 15)

These actions are available, in addition to the standard **ORDER POWER!** functions:

Action	Description
2=Change	Display <i>Order Interface Detail Record Panel 1</i> (figure 16) and <i>Order Interface Detail Record Panel 2</i> (figure 17) to update the detail line.
4=Delete	Display the <i>Detail record delete confirmation window</i> (figure 18) to confirm deletion of the selected detail line.
5=Display	Display <i>Order Interface Detail Record Panel 1 window</i> (figure 19) and <i>Order Interface Detail Record Panel 2 display</i> (figure 20) to view the detail line.
6=Gift Certificate	Display <i>Gift Certificate Information window</i> (figure 21) to update Gift Certificate information
F15=Header	Display the <i>Order Interface Header Inquiry panel</i> (figure 9).

To change an order detail line

1. Refer to Order Interface Edit report (see page 17) to determine why the order is in error status.
2. On the *Order Interface Detail Inquiry panel* (figure 15), type **2** (Change) beside the detail line you want to change, then press **Enter** to display *Order Interface Detail Record Panel 1* (figure 16).

Order Interface Detail Record Panel 1			Errors Found
Batch # 24073	Record #	10 Line # 1	
			Requested <u>3/01/99</u>
Ordered:			Scheduled <u>3/01/99</u>
Item BONKIT	Qty	1.000	
To Ship:			
Item BONKIT	Qty		
Bonnie 15	Kit Wolf - part/n, stock/n		
?Whse <u>MIA</u>	Miami Warehouse		
To <u>12</u>	TODD REYNOLDS		Exists in OP
?Pick Ticket Code <u>P</u>	Ok to go		Info 1 <u>Detail 1</u>
?Ship Via <u>UPS</u>	UPS Ground		Info 2 <u>Detail 2</u>
			Info 3 <u>Detail 3</u>
F1=Help F3=Exit F4=Prompt F8=Ship to Customer F12=Cancel F24=Replenishment			

Order Interface Detail Record Panel 1 (figure 16)

- Change the appropriate information, then press **Enter** to display *Order Interface Detail Record Panel 2* (figure 17).

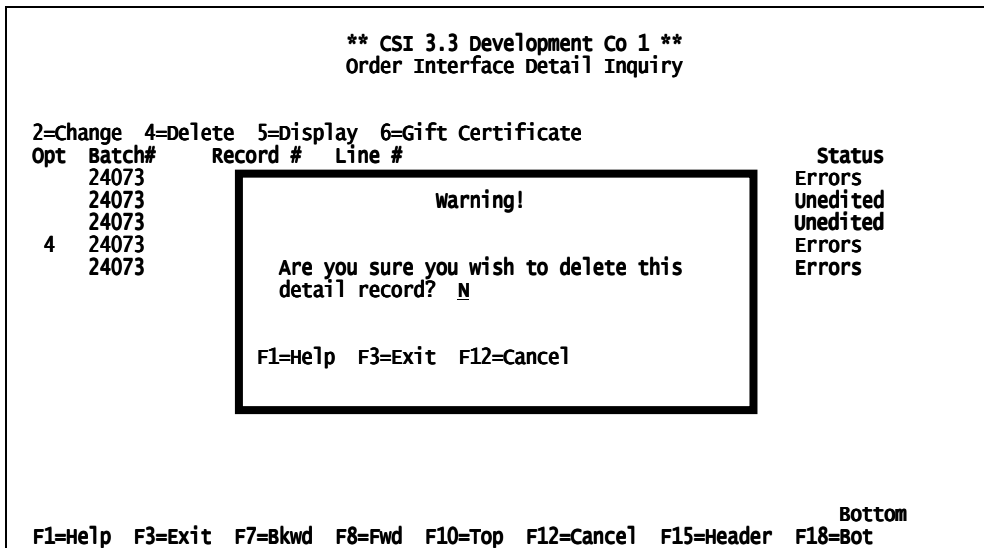
Order Interface Detail Record Panel 2			Errors Found
Batch # 24073	Record #	10 Line # 1	
Selling Price <u>149.9700</u>			Discountable <u>N</u> Y/N
Unit Price <u>149.9700</u>			
?Pricing Media <u>MISC</u>	Miscellaneous Media Code		
?Return Code			
----- Line Totals -----			
S/H	<u>6.19</u>		
Misc 1			
Misc 2			
Discount			
Tax 1			
Tax 2			
F1=Help F3=Exit F4=Prompt F12=Cancel			

Order Interface Detail Record Panel 2 (figure 17)

- Change the appropriate information, then press **Enter** to update the order.

To delete an order detail line

- On the *Order Interface Detail Inquiry panel* (figure 15), type **4** (Delete) beside the order you want to delete to display the *Detail record delete confirmation window* (figure 18).

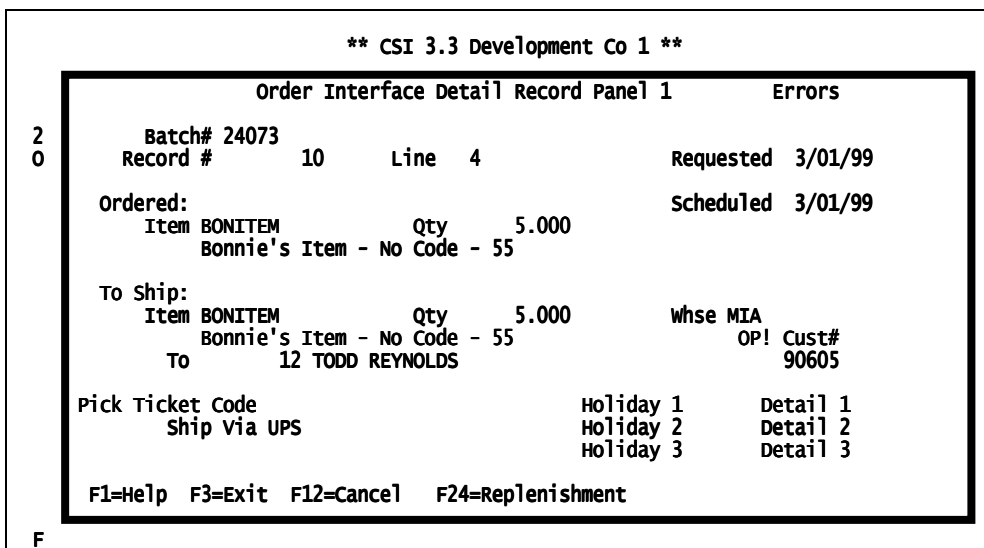


Detail record delete confirmation window (figure 18)

2. Type **Y** in the delete confirmation window, then press **Enter** to delete the detail line.

To display an order detail line

1. On the *Order Interface Detail Inquiry* panel (figure 15), type **5** (Display) beside the detail line you want to see, then press **Enter** to display the *Order Interface Detail Record Panel 1* window (figure 19).



Order Interface Detail Record Panel 1 window (figure 19)

2. Press **Enter** again to display *Order Interface Detail Record Panel 2* display (figure 20).

```

** CSI 3.3 Development Co 1 **
Order Interface Detail Record Panel 2      Errors
2  Selling Price      17.0000              Discountable N
0  Unit Price        17.0000
Pricing Media MISC
Return Code                      reason # 2

----- Line Totals -----
          S/H              3.51
          Misc 1
          Misc 2
          Tax 1
          Tax 2
          Discount
F1=Help  F3=Exit  F12=Cancel
F

```

Order Interface Detail Record Panel 2 display (figure 20)

To work with Gift Certificate information

1. On the *Order Interface Detail Inquiry panel* (figure 15), type **6** (Gift Certificate) beside the detail line you want to work with, then press **Enter** to display *Gift Certificate Information window* (figure 21).

```

** CSI 3.3 Development Co 1 **
Order Interface Detail Inquiry

2=Change 4=Delete 5=Display 6=Gift Certificate
Opt Batch# Record # Line # Status
6
GIFTCER Gift Certificate Information
gift Certificate
Selling Price      15.00
Face Value         15.00
Recipient Name     Dusty
Sender Name        Kate
Message           Hi Dusty *
                  You are the best *
                  Have a good weekend *
                  Kate *
F1=Help  F12=Cancel
F1

```

Gift Certificate Information window (figure 21)

2. Change the appropriate information, then press **Enter** to update the record.

To work with Additional Payments and Order Notes

If payment information is missing or incomplete, you can correct the record by entering **Additional Payment** information. You can also access **Order Notes** using this option.

On the *Order Interface Header Inquiry panel* (figure 9), type **7** (Addtl Pymnts) beside the order you want to work with, then press **Enter** to display *Order Import Additional Payment Update panel* (figure 23).

```

Position: Batch#          ** CSI 3.3 Development Co 1 **
Pstn : _____      Imported Additional Payments Inquiry
Batch: 24073
Order: _____      3
      2=Change  5=Display

Opt Seq#   Amount   Tnd  Tender Number   Auth Code/Comment
-   001       55.00  $
-   002       45.00  CHK

                                                    Bottom

F1=Help    F3=Exit    F6=Create   F7=Bkwd    F8=Fwd     F10=Top
F12=Cancel F18=Bottom

```

Imported Additional Payments Inquiry window (figure 22)

These actions are available, in addition to the standard **ORDER POWER!** functions:

Action	Description
2=Change	Display the <i>Order Import Additional Payment Update panel (figure 23)</i> to update the payment record or Order Notes .
5=Display	Display <i>Additional Payment Display window (figure 24)</i> to view the payment record and Order Notes .
F6=Create	Display the <i>Order Import Additional Payment Update panel (figure 23)</i> to create a new payment record or Order Notes .

To create or change Additional Payment records or Order Notes

1. On the *Imported Additional Payments Inquiry window (figure 22)*, press **F6** (Create) to display the *Order Import Additional Payment Update panel (figure 23)*.

-or-

1. On the *Imported Additional Payments Inquiry window (figure 22)*, type **2** (Change) beside the detail line you want to work with, then press **Enter** to display the *Order Import Additional Payment Update panel (figure 23)*.


```

** CSI 3.3 Development Co 1 **
Order Import Additional Payment Update

Batch Number 24073
Order / Seq# 3 / 001

Amount _____ voucher
?Tender Code
Tender Number _____ Expiration ____ Bank
Authorization _____ Decline ____ AVS Code

Import Text

Header Comment Info:
?Code
Text

Delete

F1=Help F3=Exit F4=?List F12=Cancel

```

Order Import Additional Payment Update panel (figure 23)

4. Add or change the appropriate information, then press **Enter** update the record.

To display Additional Payment information or Order Notes

1. On the *Imported Additional Payments Inquiry* window (figure 22), type **5** (Display) beside the detail line you want to see, then press **Enter** to display the *Additional Payment Display* window (figure 24).

```

Position: Batch# ** CSI 3.3 Development Co 1 **
Pstn : _____ Imported Additional Payments Inquiry
Batch: 24073
Order: 2=Chan
Opt Seq Batch # 24073
5 00 Order # 3 Seq# 001
- 00 Amount 55.00 Print Voucher

Tender / # $ Exp Bank
Authorization Approved Exp Decl Bank
Auth Date 0/00/00 AVS Transmit Num

Import Text CASH IS GOOD

Header Comment Info:
Code
Text

F1=Help F12=Can F1=Help F3=Exit F12=Cancel De1

```

Additional Payment Display window (figure 24)

To work with Coupon information

If coupon information is missing or incomplete, you can correct the record by entering **Coupon** information.

1. On the *Order Interface Header Inquiry* panel (figure 9), type **8** (Coupons) beside the order you want to work with, then press **Enter** to display *Order Interface Coupon Inquiry* window (figure 25).

```

Position: Batch#      ** CSI 3.3 Development Co 1 **
Record #              Order Interface Header Inquiry

2=Change 4=Delete
Opt Batch # Rec
8 24073
8 24073
8 24073 CR
8 24073
8 24073
8 24073
8 24073
8 24073
8 24073
8 24073
8 24073
8 24073
8 24073 CR
8 24073
8 24073
F1=Help F3=Exit

24073      Order Interface Coupon Inquiry
3
2=Change 5=Display
Opt Line Coupon/Item      Coupon Amount Ovr Status
-      TEST COUPON          12.82  N  No Errors
-      1 10% LINE MERCH     14.25  N  No Errors
-      1 KS60                27.07      No Errors

Bottom
F1=Help F3=Exit F7=Bkwd F8=Fwd F10=Top F12=Cancel
F18=Bot

```

Order Interface Coupon Inquiry window (figure 25)

These actions are available, in addition to the standard **ORDER POWER!** functions:

Action	Description
2=Change	Display the <i>Order Interface Coupon Update panel</i> (figure 26) to update the coupon record.
5=Display	Display the <i>Order Interface Coupon Inquiry display window</i> (figure 27) to view the coupon record.

To change Coupon records

1. On the *Order Interface Coupon Inquiry window* (figure 25), type **2** (Change) beside the **Coupon** record you want to work with, then press **Enter** to display the *Order Interface Coupon Update panel* (figure 26).

```

Order Interface Coupon Update

Batch # 24073
Order #      3
Line #

?Coupon      TEST COUPON      10% Off Order Merch
Coupon Amt   12.82
Override     N Y/N

Delete

F1=Help F3=Exit F4=?List F12=Cancel

```

Order Interface Coupon Update panel (figure 26)

2. Add or change the appropriate information, then press **Enter** update the record.

To display Coupon information

1. On the *Order Interface Coupon Inquiry* window (figure 25), type **5** (Display) beside the **Coupon** record you want to see, then press **Enter** to display the .

```

Position: Batch# _____ ** CSI 3.3 Development Co 1 **
          Record # _____ Order Interface Header Inquiry

2=Change 4=Delete
Opt Batch # Rec
8 24073
 24073
 24073
 24073
 24073
 24073
 24073
 24073 CR
 24073
 24073
 24073

F1=Help F3=Exit

24073 Order Interface Coupon Inquiry
3
2=Change 5=Display
Opt Line Coupon/Item Coupon Amount Ovr Status
24073 Order Interface Coupon Inquiry
3
Line #
Coupon TEST COUPON
          10% Off Order Merch
Override N
Coupon Amt 12.82
Min Amount
Exp Date 0/00/00 Override Allowed N
          Override Allowed N
F
F1=Help F3=Exit F12=Cancel
    
```

Order Interface Coupon Inquiry display window (figure 27)

Order Interface Detail Inquiry panel

This panel allows you quick access to the detail lines of all orders you have imported. From the **ORDER POWER! Main Menu**, select: **Order Processing → Maintain Imported Orders in Error Status → F15=All Detl** to display the *Order Interface Detail Inquiry panel* (figure 28)

```

Position: Batch# _____ ** CSI 3.3 Development Co 1 **
          Record # _____ Order Interface Detail Inquiry
          Line#
2=Change 4=Delete 5=Display 6=Gift Certificate
Opt Batch# Record # Line # Status
- 24073 3 1 Errors
- 24073 3 2 Unedited
- 24073 3 3 Unedited
- 24073 4 1 Errors
- 24073 4 2 Errors
- 24073 5 1 Errors
- 24073 5 2 Errors
- 24073 7 1 Errors
- 24073 8 1 Errors
- 24073 8 2 Errors
- 24073 9 1 Errors
- 24073 10 1 Errors
- 24073 10 2 Unedited
- 24073 10 3 Unedited
- 24073 10 4 Errors
More...
F1=Help F3=Exit F7=Bkwd F8=Fwd F10=Top F12=Cancel F15=Header F18=Bot
    
```

Order Interface Detail Inquiry panel (figure 28)

These actions are available, in addition to the standard **ORDER POWER!** functions:

Action	Description
2=Change	Display <i>Order Interface Detail Record Panel 1 (figure 16)</i> and <i>Order Interface Detail Record Panel 2 (figure 17)</i> to update the detail line.
4=Delete	Display the <i>Detail record delete confirmation window (figure 18)</i> to confirm deletion of the selected detail line.
5=Display	Display <i>Order Interface Detail Record Panel 1 window (figure 19)</i> and <i>Order Interface Detail Record Panel 2 display (figure 20)</i> to view the detail line.
6=Gift Certificate	Display <i>Gift Certificate Information window (figure 21)</i> to update Gift Certificate information
F15=Header	Display the <i>Order Interface Header Inquiry panel (figure 9)</i> .

Post Imported Orders

After correcting errors in the imported orders, you can again attempt to post the orders. When you run the **Post Imported Orders** option, **Order Interface** reviews all the orders that were held for errors. If the errors have been corrected it creates **Accounts Receivable** and **General Ledger** transactions and order shipment records, adjusts the inventory (reduces quantity on hand), moves records to the “regular” order files for reporting purposes, and produces several reports (see “Reports created by importing orders” on page 34).

To post imported orders

From the **ORDER POWER! Main Menu**, select: **Order Processing > Post Imported Orders** to display the *Post Imported Orders panel* (figure 29).

** CSI 3.3 Development Co 1 **
Post Imported Orders

Posting Date 8/10/99
Deposit Number 081099
Use Current Printer Defaults Y Y/N
Submit to Batch N Y/N

F1=Help F3=Exit F12=Cancel

Post Imported Orders panel (figure 29)

- Complete these fields:

Posting Date

Type the date that you want to assign to the posting of the selected batch(es).

Deposit Number

Type a number to identify given to a group of payment records in AR. This number may be used to indicate a specific bank deposit slip. If you don't enter an identifier, **ORDER POWER!** uses the system date.

Use Current Printer Defaults

Type a code to indicate whether to change the existing printer defaults for the current report.

Y (yes) accept the existing printer defaults

N (no) display the *Printer Defaults panel* to make changes the current printer defaults

Submit to Batch

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

Y (yes) indicates that the report will be submitted as a batch job

N (no) indicates that the report will be run interactively

Reports created by importing orders

After you run the Import/Edit/Post Imported Orders from Work File option, **ORDER POWER!** prints some or all of the following reports, depending on if certain errors are found to exist:

- Order Interface Posting Report - Orders *see page 14*
This report lists the number of orders successfully created in **ORDER POWER!**. This refers to records that were processed completely without errors. The **ORDER POWER!** order numbers are listed on the report.
- Order Interface Posting Report - Counter Sales *see page 15*
This report lists the number of counter sales orders successfully created in **ORDER POWER!**. This refers to records that were processed completely without errors. The **ORDER POWER!** order numbers (if any) are listed on the report.
- GL Summary for Inventory Transactions *see page 16*
This listing of GL transactions is only printed when you post **Closed** orders (**Counter Sales**).
- AR Posting from Counter Invoices - Detail *see page 35*

AR Posting from Counter Invoices - Detail

Computer Solutions, Inc.		Page: 1	
User: CSIUSER		Date: 6/02/99	
Wsid: DSP108S1		Time: 11:47:35	
Prog: OP01018		AR Posting from Counter Invoices - Detail	
Deposit #: 111111		Post Date: 6/02/99	
Order Bill To Name		12476 Gayle Briggs	
54292			
Computer Solutions, Inc.			
Merchandise	12.00	Country Tax	.00
Personalize	.00	Discount 1	.00
Ship/Hand	.00	Discount 2	.00
Tender Misc	.00	Coupon	.00
Item Misc	12.34	Order Total	24.34
Sales Tax 1	.00	Tendered	24.34

Tran Amount	24.34	Tender #	
Debit	24.34		
Credit	.00		
Cash	001-000-00110		
Miscellaneous 2	001-333-00316		
Merchandise	001-010-55000		
Total	24.34		

Order	Bill To Name	Country Tax	2.00
54364	9184 ARMANDO A SOMEILLAN	Discount 1	.00
		Discount 2	.00
		Coupon	.00
		Order Total	32.78
		Tendered	32.78

Tran Amount	32.78	Tender #	
Debit	32.78		
Credit	.00		
Cash	001-000-00110		
Sales Tax 2	001-222-00237		
Sales Tax 1	001-999-00236		
Merchandise	001-200-20000		
Total	32.78		

Order	Bill To Name	Country Tax	2.00
54365	9184 ARMANDO A SOMEILLAN	Discount 1	.00
		Discount 2	.00
		Coupon	.00
		Order Total	32.78
		Tendered	32.78

Tran Amount	32.78	Tender #	
Debit	32.78		
Credit	.00		
Cash	001-000-00110		
Sales Tax 2	001-222-00237		
Sales Tax 1	001-999-00236		
Merchandise	001-200-20000		
Total	32.78		

Order	Bill To Name	Country Tax	2.00
54366	9184 ARMANDO A SOMEILLAN	Discount 1	.00
		Discount 2	.00
		Coupon	.00
		Order Total	32.78
		Tendered	32.78

Tran Amount	32.78	Tender #	
Debit	32.78		
Credit	.00		
Cash	001-000-00110		
Sales Tax 2	001-222-00237		
Sales Tax 1	001-999-00236		
Merchandise	001-200-20000		
Total	32.78		

About the transfer files

The **Order Interface** program imports orders from an external file and processes them into **ORDER POWER!**. This section discusses some of the general requirements for the transfer file, and characteristics of the process and the files written.

Order Interface writes the following files based on the imported information:



For updated and complete file layouts, please contact **Computer Solutions, Inc.** Customer Service.

File Name	Description	See page...
WORDER	Order file	36
WORDE2	(optional) Order/Bill/Ship to Email & Extension Info file	39
WORDE3	(optional) Gift Certificates file	39
WORDPY	(optional) Additional Payments and Order Notes file	39
WMLLST	(optional) Inquiry customers file	39

Order file: WORDER

The following fields are necessary to process imported orders:

WUCCID - Call Center ID

WURTYP - Import Reference Type (C or V)

WUORD# - Sales Order #

Coupons

Order Interface does not calculate coupon dollars, they must be supplied in the order upload. **ORDER POWER!** does, however, validate coupons that are imported. If the coupon is not valid, you must either add the coupon to **ORDER POWER!**, then set it up to pass the coupon validation, or change the coupon information to pass the existing validations. The following coupon information pertains to the amount applied to each line for both order and line coupons:

- If Order coupon, then enter Orig Ord Coupon \$
- If Line coupon, then enter Orig Line Coupon \$
- If both an order and line coupon, then enter Orig Ord Coupon \$ and Orig Line Coupon \$
- Enter Coupon Amt Applied as appropriate to coupon setup

Formatting requirements

- All Y/N fields default to 'N' if blank or not 'Y'.
- All numeric fields must be right-justified with leading zeros, no commas, and no decimal point.

- Commas and decimals are implied:
If a numeric field is defined as '9S 2' then the value of \$1,215.12 is stored as '000121512'. If a numeric field is defined as '7S 0' then the value of 10,219 is stored as '0010219'.
- All alpha fields must be left-justified with trailing blanks.

Creating the Mail List record

The following applies to **Ordered by**, **Billed to**, and **Ship to**:

- If Customer Number and the customer number is a valid **ORDER POWER!** customer number, that customer number is used for the order.
- If no **Customer Number** is provided or the furnished **Customer Number** is invalid, but name/address information is provided, **Order Interface** attempts to find the customer by **Match Code** (see the explanation on page 7).
- If a **Match Code** verification is successful, and the furnished name/address/city/state/zip also matches the mail list record, the matching **ORDER POWER! Customer Number** is used.
- If no match is found, a new **ORDER POWER! customer** will be created.
- If no **Customer Number** and no name/address information is provided, then this record is an ERROR and will not post an order to **ORDER POWER!** until customer information has been provided.
- If the **Ordered-By Customer** has a valid **Customer Number** or address furnished, and there is no **Bill-To** or **Ship-To** information furnished, the **Bill-To** or **Ship-To Customer** is assumed to be the same as the **Ordered-By Customer**.
- If the **Ordered-By Customer** has a valid **Customer Number** or address furnished, and **Bill-To** has a valid **Customer Number** or address furnished, and there is no **Ship-To** information provided, then the **Ship-To Customer** is assumed to be the same as the **Bill-To Customer**.

Order payment information

For **Type 1** prepaid orders only, **Order Interface** requires the amount tendered to be included in the imported file. The information is written to this field:

WUPAMT - Payment Tendered

For all orders, **Order Interface** calculates this field:

WUTOTL - Total Order Amt

as the total of detail merchandise dollars, quantity ordered multiplied by the selling price.
(**WUOQTY** x **WUIPRC** = **WUTOTL**)

Tax Information

Country Tax

If you have not selected to have **Order Interface** calculate the tax on *Order Interface Company Update panel 1 (figure 3)*, you must include this information in the imported file:

WUCTAA - Country Taxable Amt
WUCTNA - Country Non-Tax Amt
WUCTXA - Country Tax Amt
WUCTXP - Country Tax Percent

State Tax

If you have not selected to have **Order Interface** calculate the tax on *Order Interface Company Update panel 1 (figure 3)*, you must include this information in the imported file:

WUSTAA - State Taxable Amt
WUSTNA - State Non-Tax Amt
WUSTXA - State Tax Amt
WUSTXP - State Tax Percent

Local Tax

If you have not selected to have **Order Interface** calculate the tax on *Order Interface Company Update panel 1 (figure 3)*, you must include this information in the imported file:

WULTAA - Local Taxable Amt
WULTNA - Local Non-Tax Amt
WULTXA - Local Tax Amt
WULTXP - Local Tax Percent
WULTXC - Local Tax Code

County Tax

If you have not selected to have **Order Interface** calculate the tax on *Order Interface Company Update panel 1 (figure 3)*, you must include this information in the imported file:

WUTTAA - County Taxable Amt
WUTTNA - County Non-Tax Amt
WUTTXA - County Tax Amt
WUTTXP - County Tax Percent
WUTTXC - County Tax Code

Misc Info

To use for any **Misc Info** as needed. If the item is a gift certificate, the first three positions of field **WUTEXT** in **WORDER** will be checked for sequence # to link the gift certificate to the gift certificate import file. It **MUST** be a three position numeric field. (See "Gift Certificate Information file: WORDE3" below.)

WUTEXT - Import Text

Order/Bill/Ship to Email & Ext Info file: WORDE2

This file is currently optional. It will become part of **WORDER** in next release. The call center ID, Import Ref Type, and Sales Order #

WUCCI2 - Call Center ID
WURTY2 - Import Reference Type (C or V)
WUORD2# - Sales Order #

are needed to link **WORDE2** to **WORDER** and are required if using **WORDE2**.

Gift Certificate Information file: WORDE3

This file is optional. The call center ID, Import Ref Type, and Sales Order #

WWCCID - Call Center ID
WWRTYP - Import Reference Type (C or V)
WWORD# - Sales Order #

are needed to link **WORDE3** to **WORDER** and are required if using **WORDE3**.

If the item is a gift certificate, the first three positions of field **WUTEXT** in **WORDER** are checked for sequence # to link the gift certificate to the gift certificate import file. It MUST be a three position numeric field.

Additional Payments and Order Notes file file: WORDPY

This file is optional, and should not be provided if multiple tenders are not being imported.

- **Type 2** or **Type 3** orders are not permitted to have additional payments
- **Multiple Tendere**s are only processed if the imported order's primary tender creates a **Type 1** order (prepaid and/or **Extended Pay Plan**).
- Additional tenders can cause an order to be overpaid, if so desired.

Inquiry customers file: WMLLST

The maillist interface is designed to import customers to the **ORDER POWER!** maillist file as an 'Inquiry type customer.

Formatting requirements

- All Y/N fields default to 'N' if blank or not 'Y'.
- All numeric fields must be right-justified with leading zeros, no commas, and no decimal point.
- Commas and decimals are implied:
If a numeric field is defined as '9S 2' then the value of \$1,215.12 is stored as '000121512'. If a numeric field is defined as '7S 0' then the value of 10,219 is stored as '0010219'.
- All alpha fields must be left-justified with trailing blanks.

Creating the Mail List record

- A customer number is not available in this import file since the entries in this file will be treated as additions to the mail list file. As a result, this import file is not designed to handle address changes.
- Before creating a new mail list customer **Order Interface** checks if the customer already exists by **Match Code** (see the explanation on page 7).

If a match code verification is successful, and the furnished name/address/city/state/zip also matches the mail list record then the upload record will be skipped. If the match code is unique or if it is found in the existing customer file but the name, address, city, state, or zip are not identical then a new customer will be created.

- If no name/address information is provided, then this record is an ERROR and no new customer will be created until the customer information has been provided.