Customer Order Portal
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Customer Order Portal

Order Portal (for Licensees)

Order Entry

Create an Order - Stocked Items

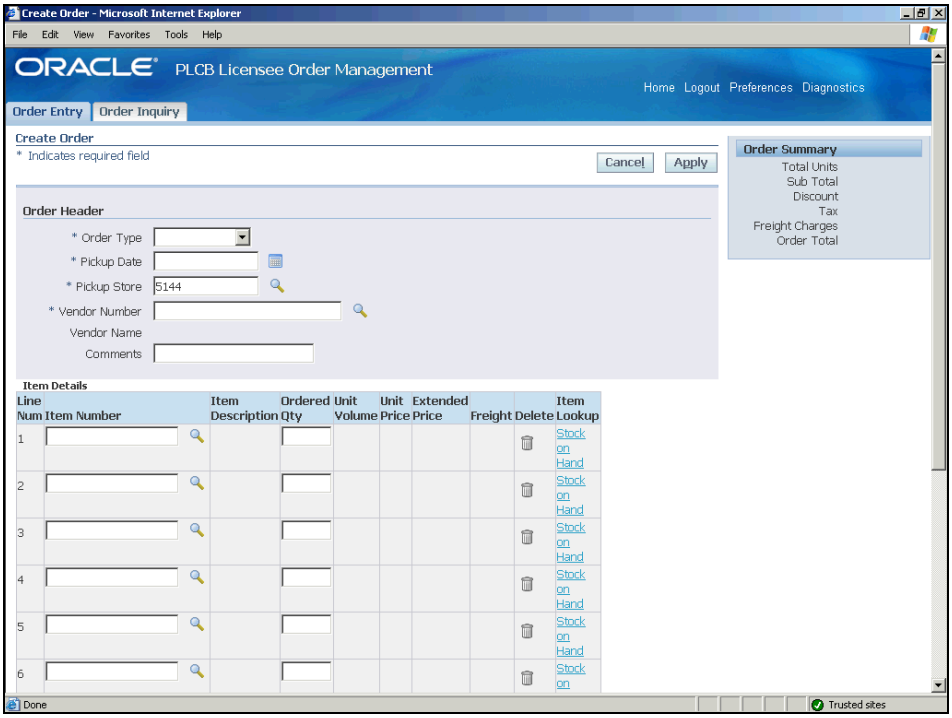
Procedure

Description:
Use this procedure to create a stock order.

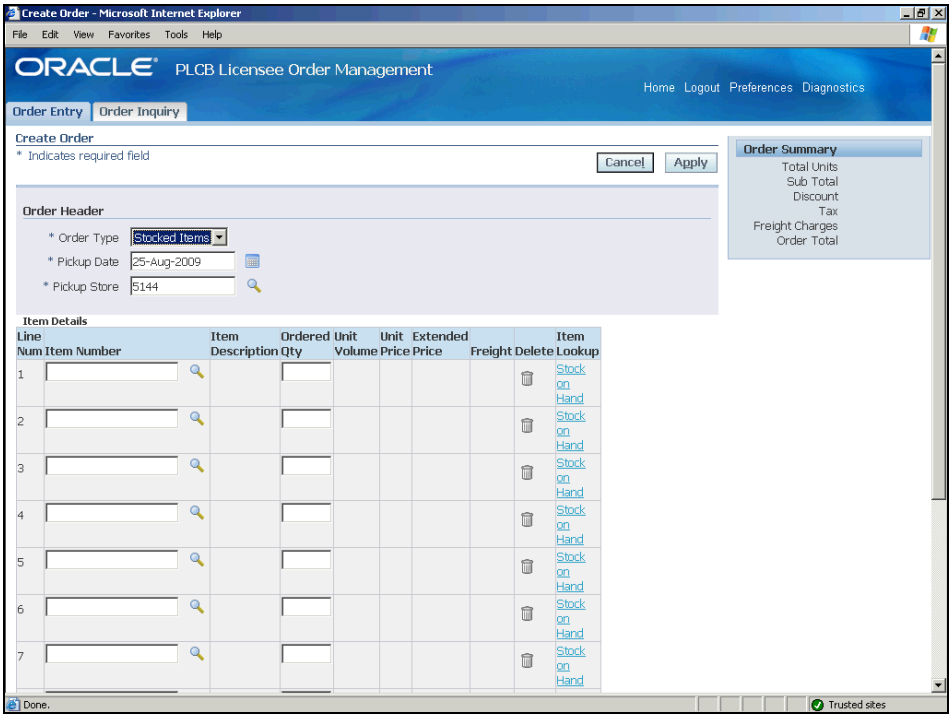
***Note*: Only stocked items can be placed on a stock order.**

Oracle Prerequisites:
- **The items must exist in RMS.**

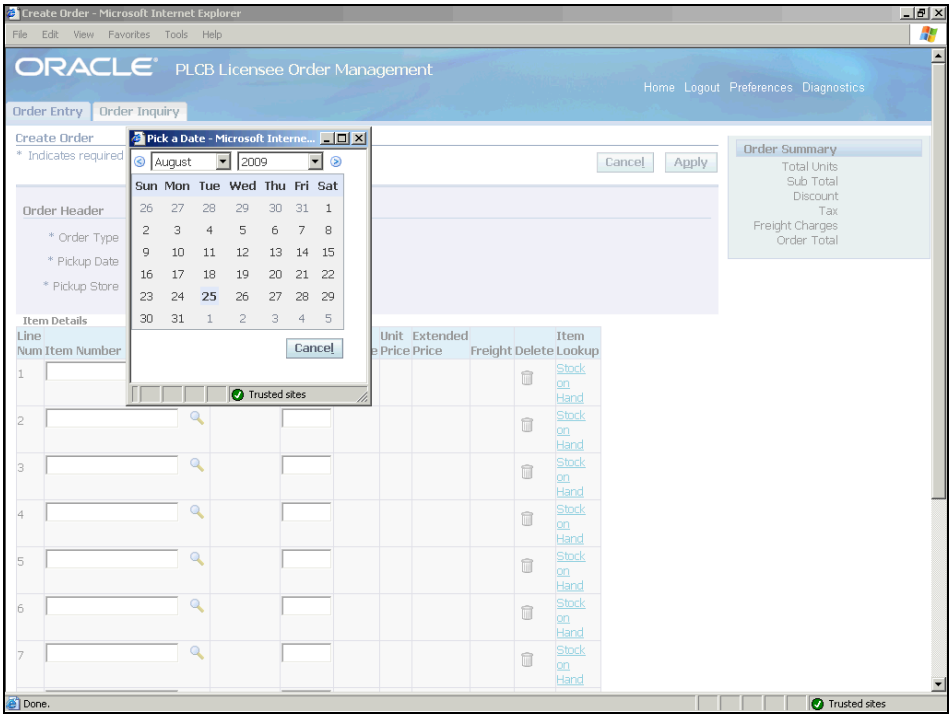
Step	Action
1.	**To complete this procedure, login to the *Order Management Portal* and select the PLCB LICENSEE ORDER MANAGEMENT responsibility.**



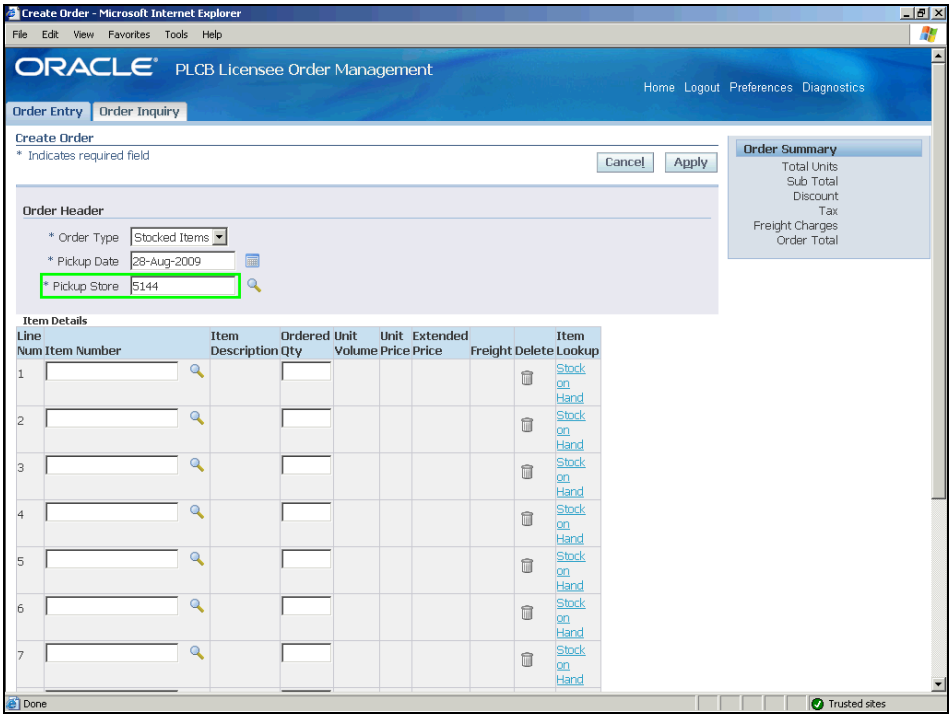
Step	Action
2.	**Enter the order header details in the *Order Header* section.** **Click on the ORDER TYPE field's drop-down icon.**
3.	**Click on the STOCKED ITEMS list item.** Stocked Items



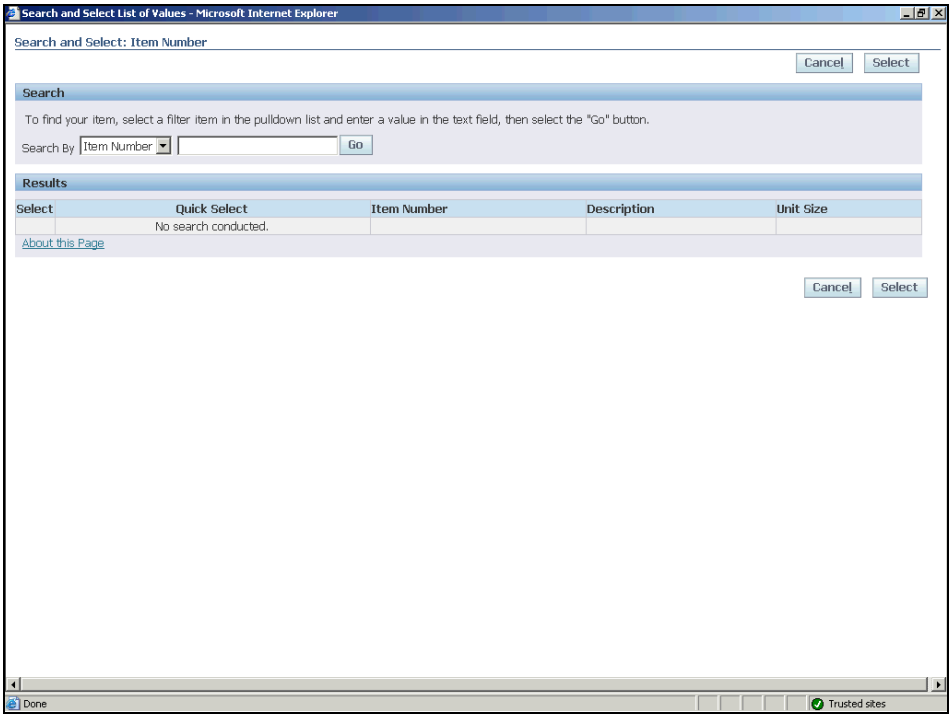
Step	Action
4.	**The pickup date defaults to the current date. If required change this date.**



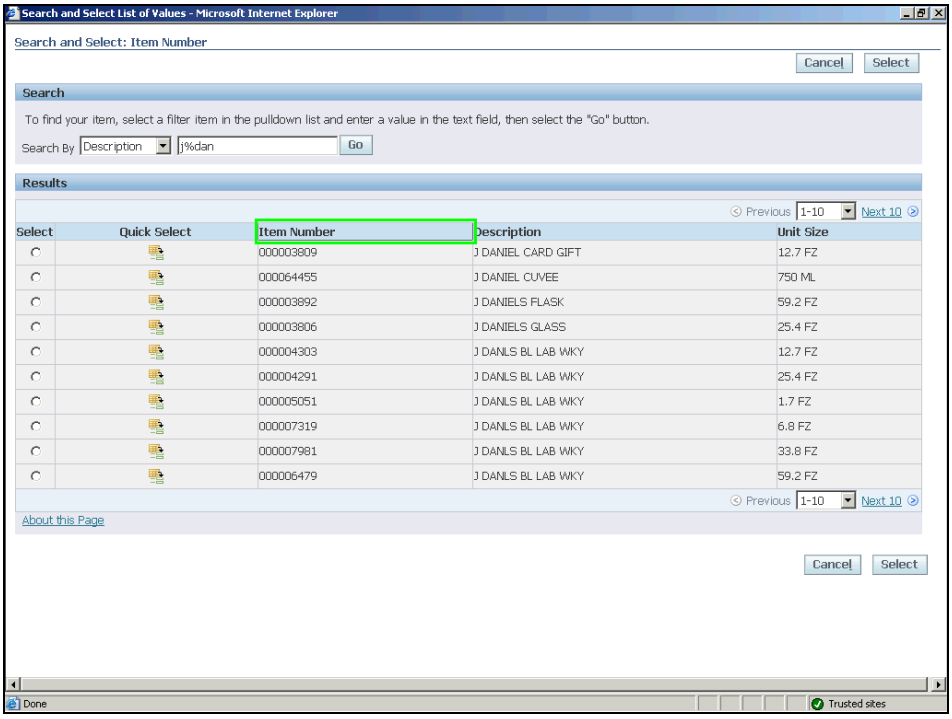
Step	Action
5.	**Enter the appropriate date in the PICKUP DATE field (DD-MMM-YYYY format) or select it from the calendar.** 28



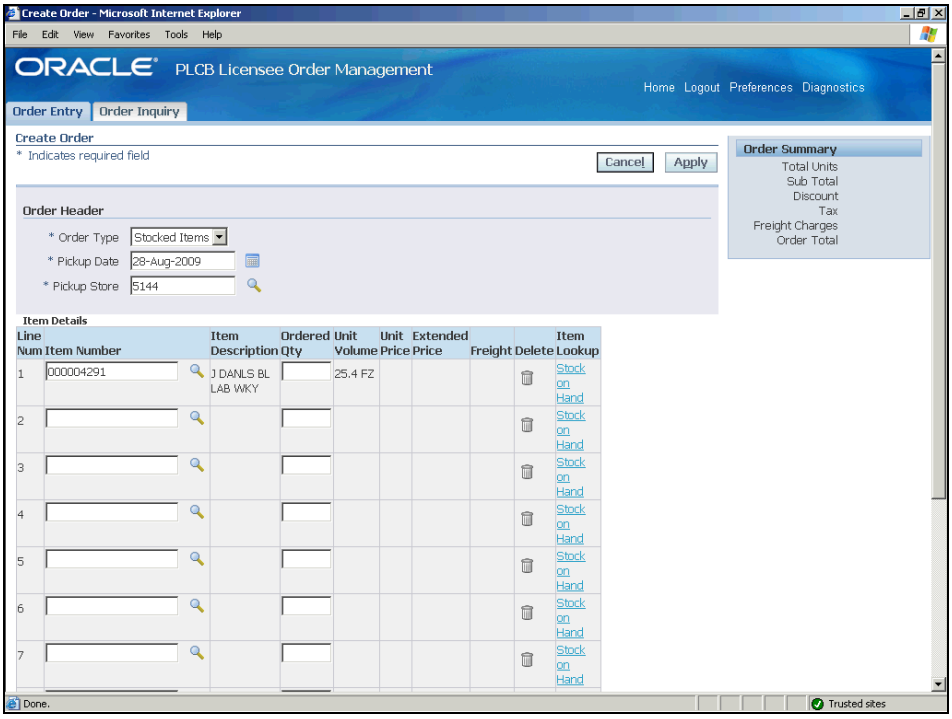
Step	Action
6.	**Note that the PICKUP STORE field defaults to the licensee's home store. Validate the entry and change it if required.** **In the *Item Details* section, specify the line items for the order. Enter the appropriate item number or use the search option to look for the desired item.** **To search for an item, click on the SEARCH icon next to the first ITEM NUMBER field.**



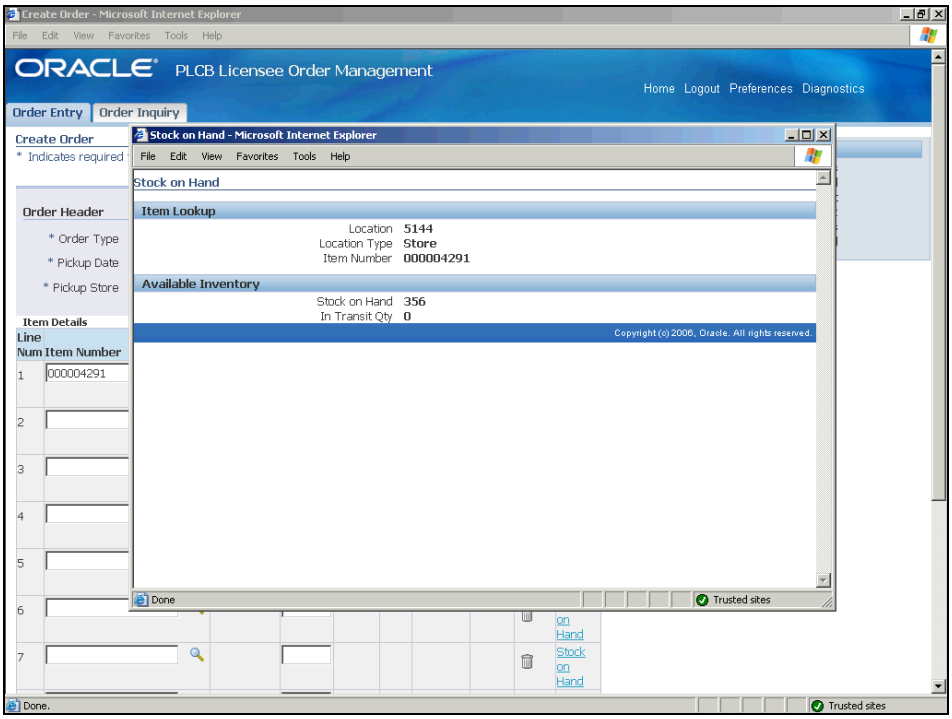
Step	Action
7.	**The *Search and Select List of Values* window displays.** **Click on the SEARCH BY field's drop-down icon.**
8.	**Select the appropriate search criteria.** **You can search by the ITEM NUMBER or the DESCRIPTION.** Description
9.	**Click in the SEARCH BY field.**
10.	**Enter the appropriate search value. Enter the complete search value or use the % sign to enter a partial search value. The % sign is a special character (called a wildcard character) that represents one or more other characters.** **For example, to search for all jack daniel, you may enter JACK DANIEL as the search value or enter a partial search value J%DAN to list all the items that begin with the letter "J" and include the word "DAN" in the their description.**
11.	**Click on GO.** Go



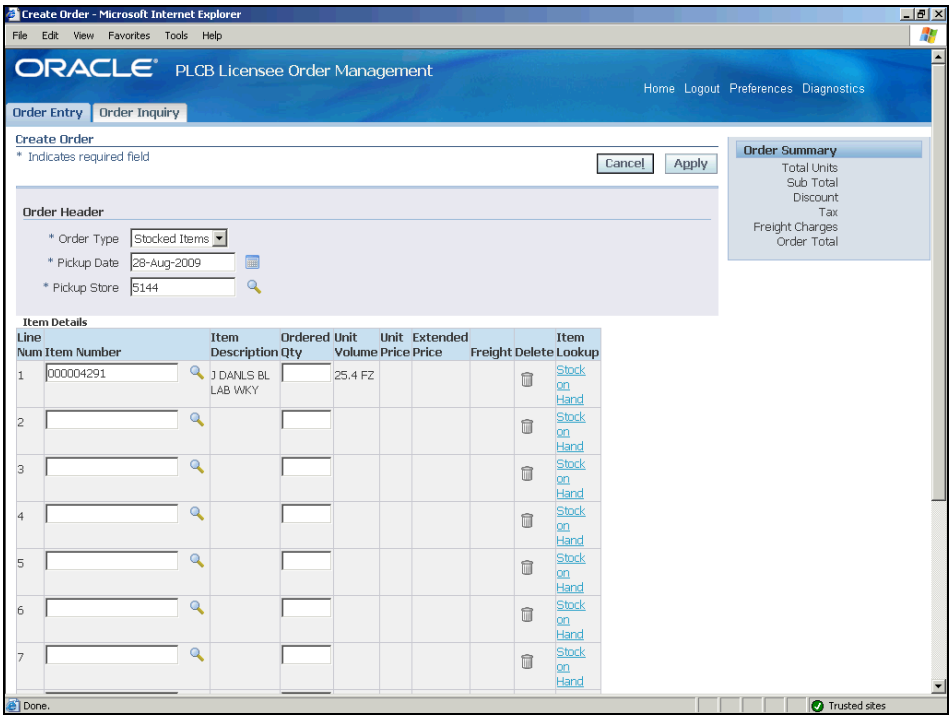
Step	Action
12.	**Select the desired item from the search results.** ***Note*: If desired, click on the ITEM NUMBER column name to sort the results by the item number. Click on the column name to view the items in the ascending order. Click on it again to change the view to descending order.**
13.	**Click on SELECT.** Select



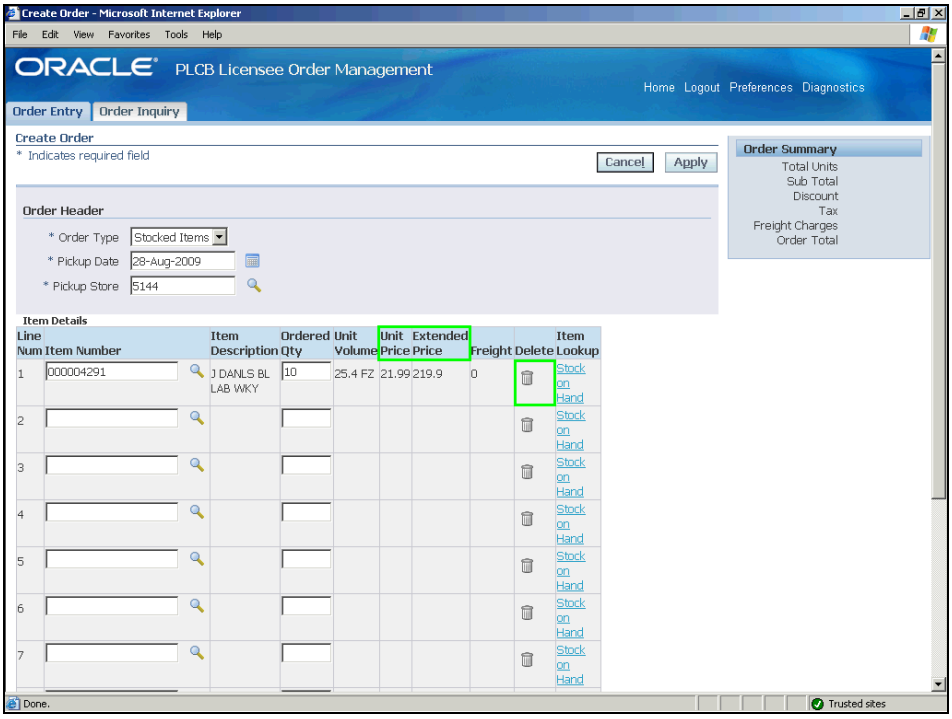
Step	Action
14.	**If desired, click on the *Stock on Hand* link to check the available inventory for the item.**



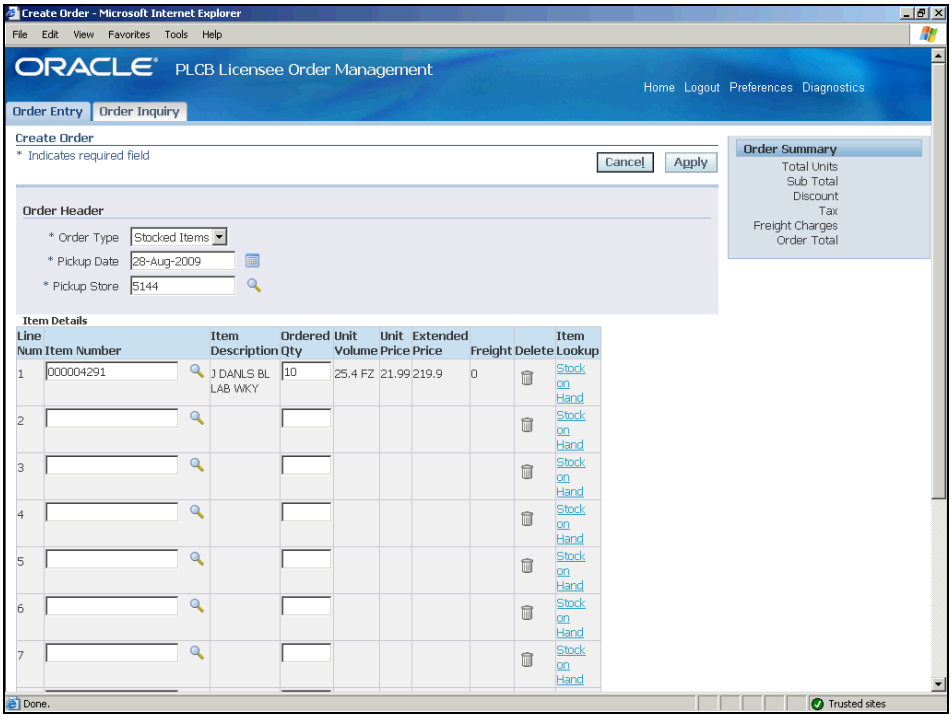
Step	Action
15.	**Review the information and close the window.**



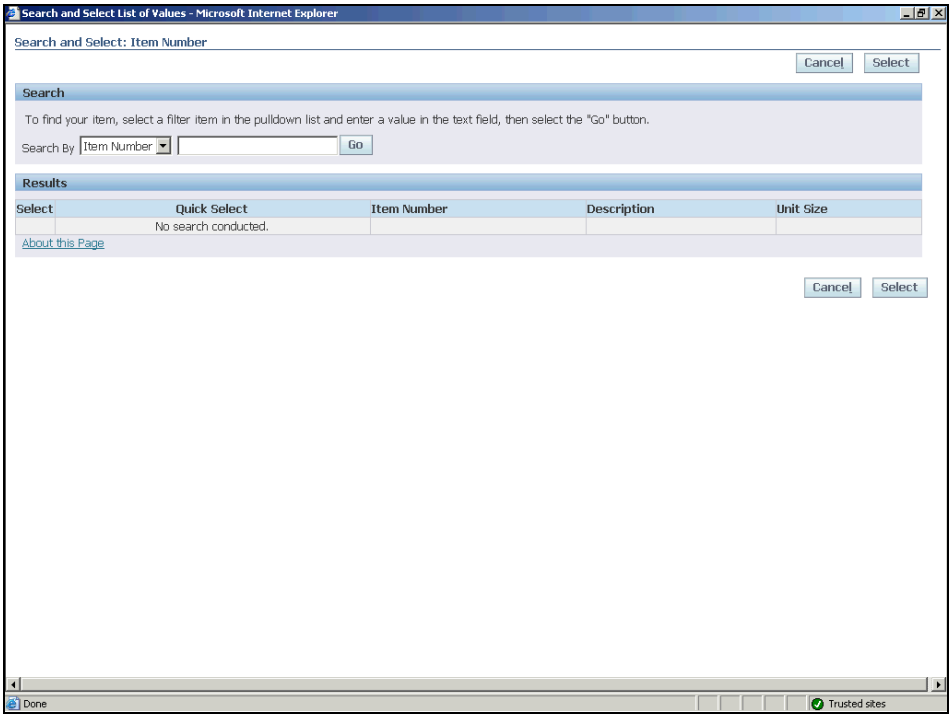
Step	Action
16.	**Click in the ORDERED QTY field.**
17.	**Enter the desired quantity.**
18.	**Press the [Tab] key on the keyboard.**



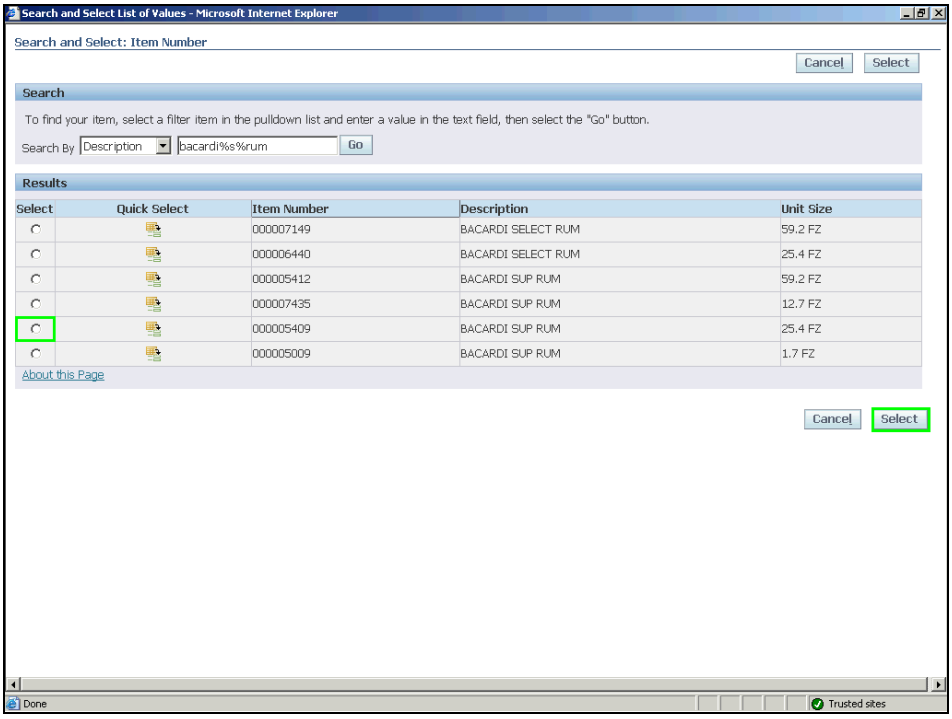
Step	Action
19.	**The UNIT PRICE and EXTENDED PRICE for the line item populate automatically.** **If desired, click on the DELETE icon to remove the item from the order.**



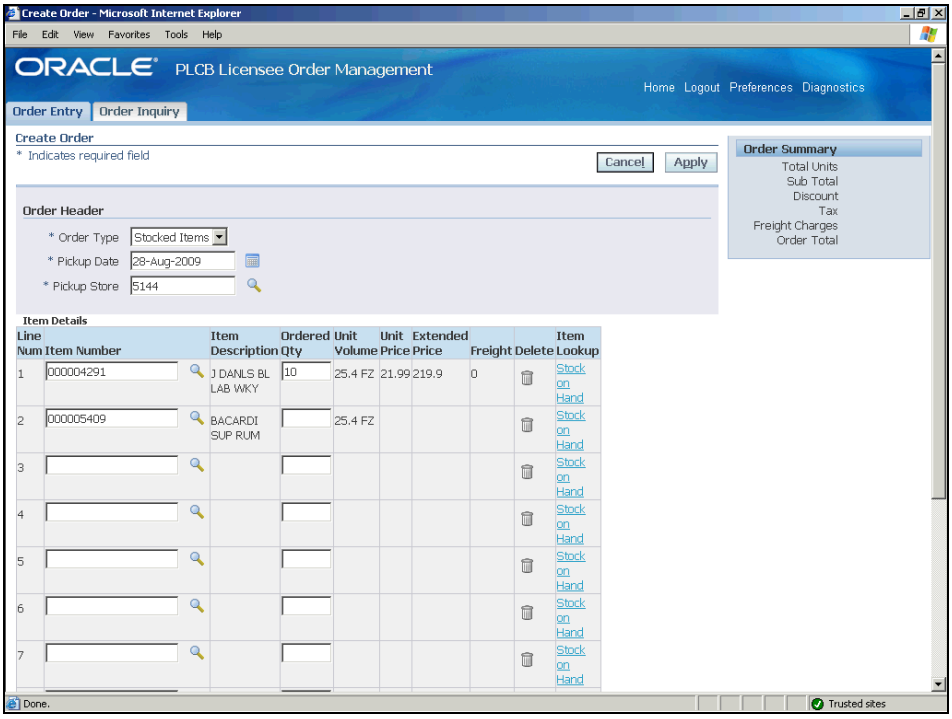
Step	Action
20.	**Specify the next item on the order. Enter the appropriate item number or use the search option to look for the desired item.**



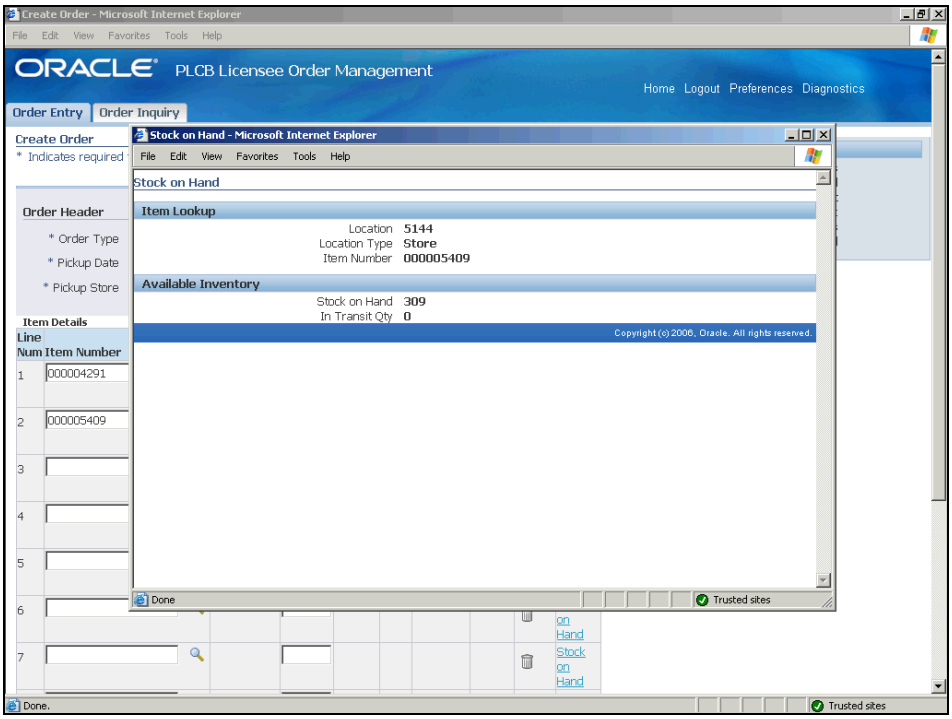
Step	Action
21.	**When searching or an item, click on the SEARCH BY field's drop-down icon.**
22.	**Select the appropriate search criteria.** Description
23.	**Click in the SEARCH BY field.**
24.	**Enter the appropriate search value.**
25.	**Click on GO.** Go



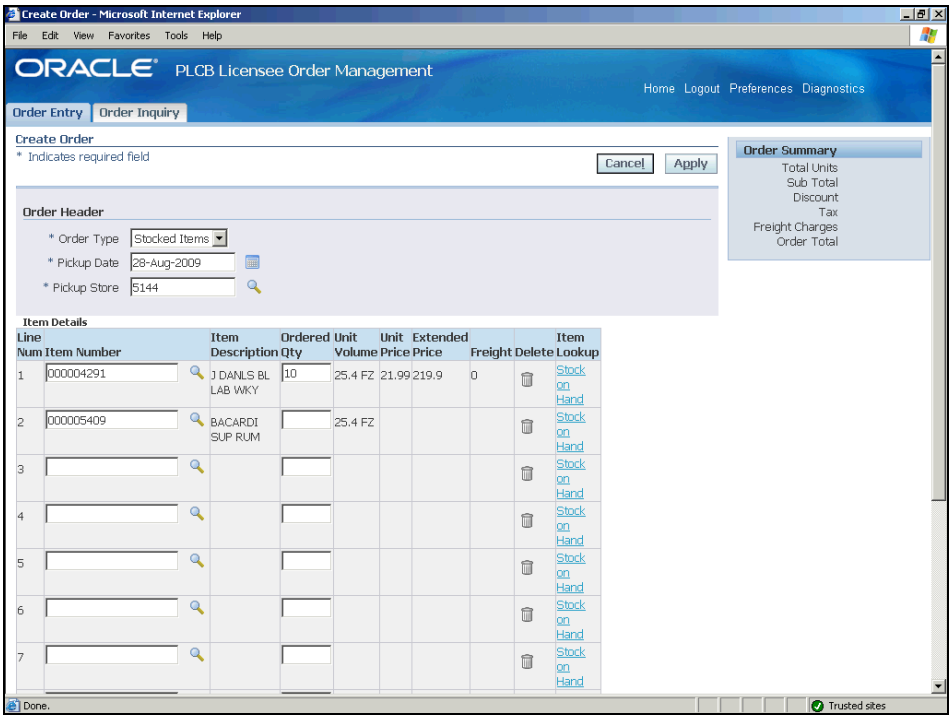
Step	Action
26.	**Select the desired item from the search results.** **To select a record, click in the SELECT radio button and then click on the SELECT icon (as shown previously). Or click on the QUICK SELECT icon for the desired record.**



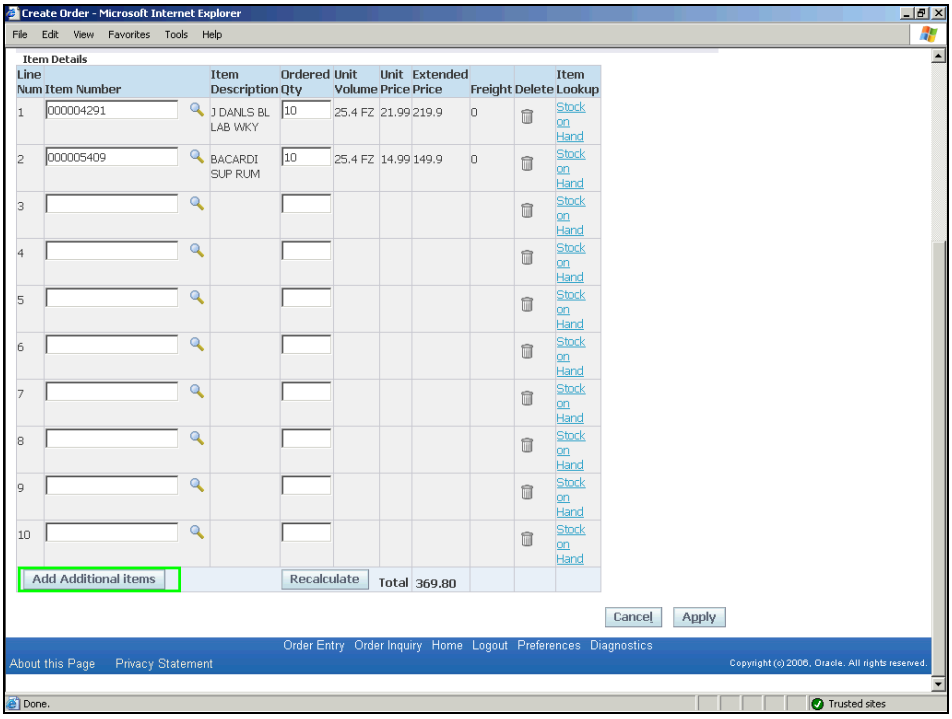
Step	Action
27.	**If desired, click on the *Stock on Hand* link to check the available inventory for the item.**



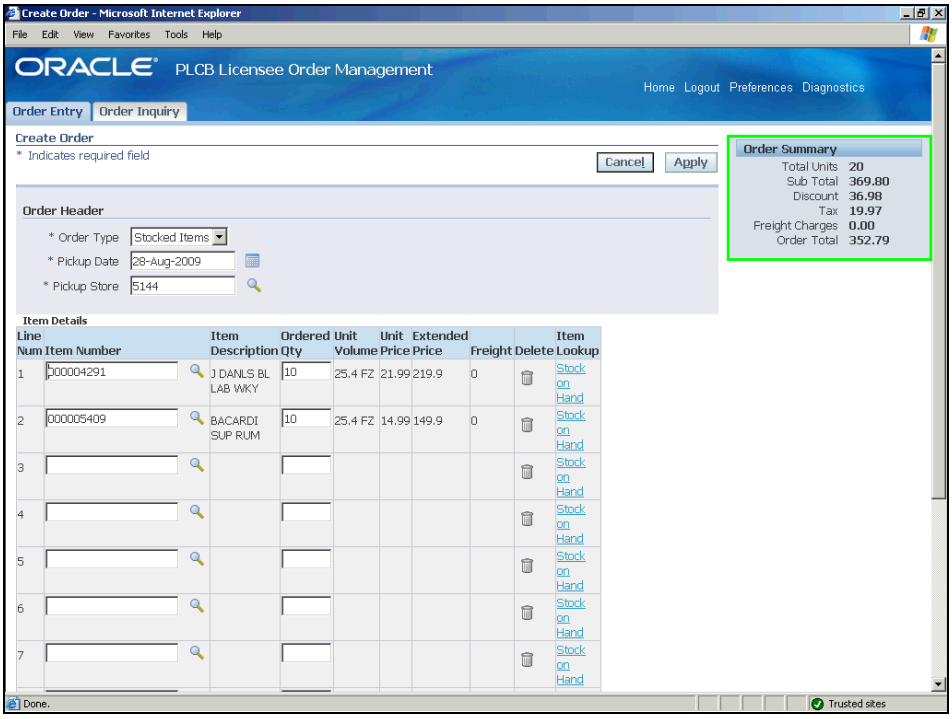
Step	Action
28.	**Review the information and close the window.**



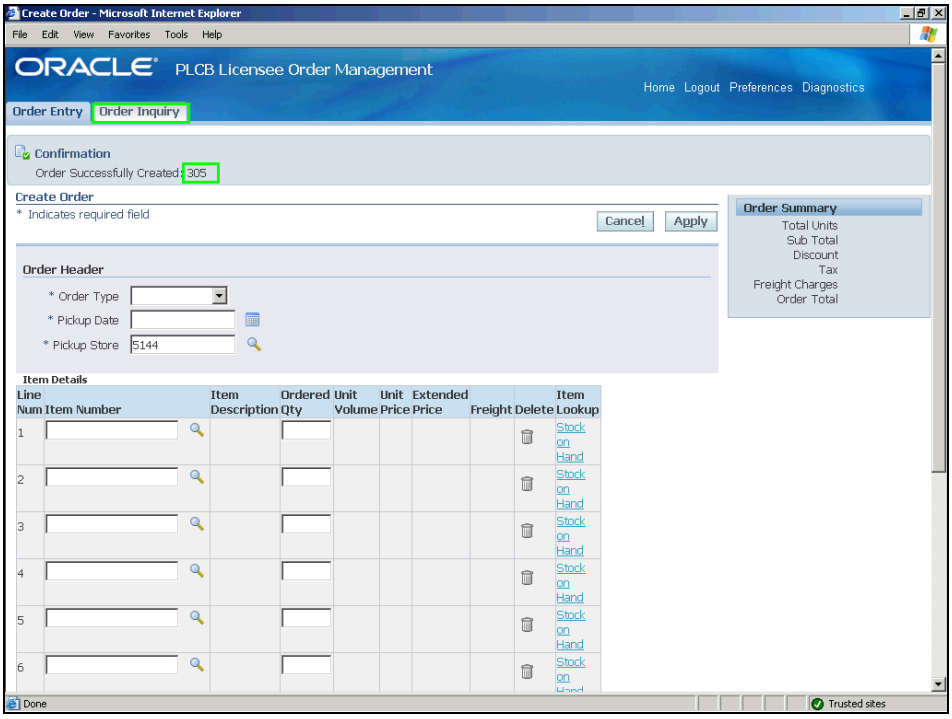
Step	Action
29.	**Click in the ORDERED QTY field.**
30.	**Enter the desired quantity.**
31.	**Press the [Tab] key on the keyboard.**
32.	**Similarly, enter all the items for the order.** **Click on the SCROLLBAR to move to the bottom of the window.**



Step	Action
33.	**After entering all the items click on RECALCULATE to calculate the order totals in the *Order Summary* section.** ***Note*: By default, the *Order Entry* form allows you to enter 10 items at a time. To enter more than 10 items, click on the ADD ADDITIONAL ITEMS icon. The ADD ADDITIONAL ITEMS icon adds lines in multiples of 10's.** Recalculate
34.	**Scroll up the window to view the *Order Summary* section.**



Step	Action
35.	**Review and verify the numbers in the *Order Summary* section and click on APPLY to create the order.** ***Note*: Once an order is submitted on the portal, the licensee cannot update or cancel it. To update or cancel an order the licensee must contact the store.** Apply



Step	Action
36.	**A blank *Order Entry* form is displayed with a confirmation message at the top.** **Note the assigned order number and if desired, use the *Order Inquiry* form to view the details and status of the order at any time.**
37.	**End of Procedure.**

Order Inquiry

Search and View an Order

Procedure

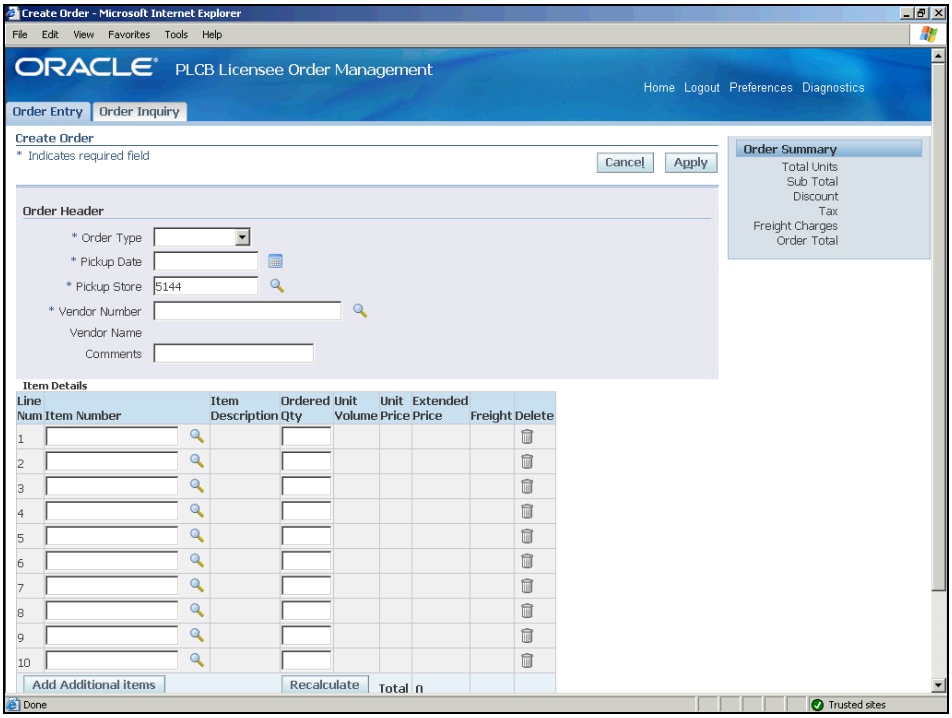
Description:

Use this procedure to search for an order and view the details.

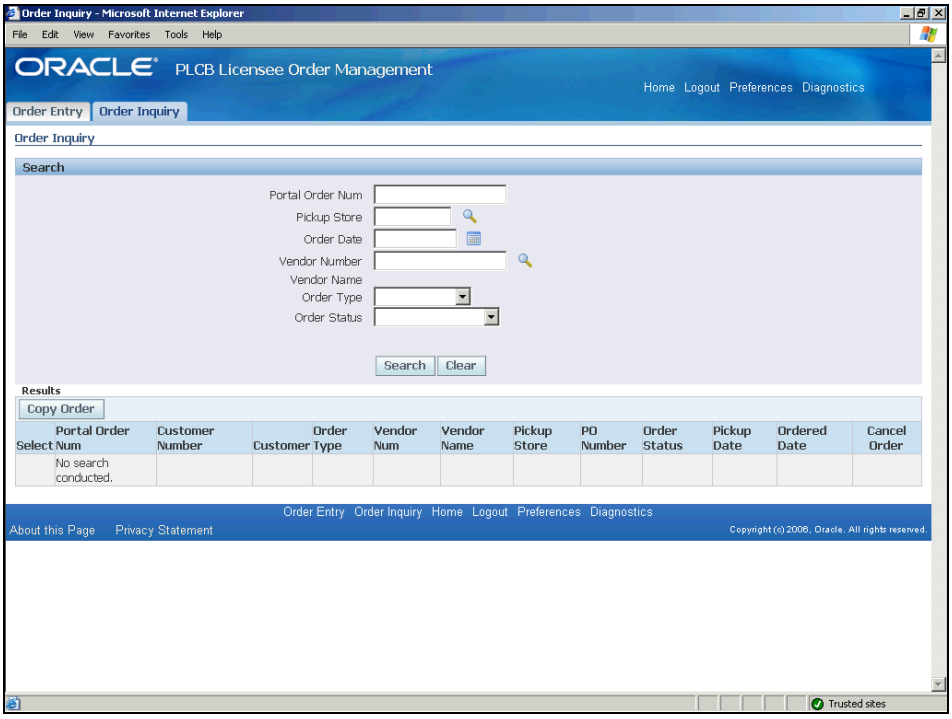
Oracle Prerequisites:

- **The licensee must have the valid login id and the responsibility to access the *Order Management Portal*.**
- **The order must exist in the system.**

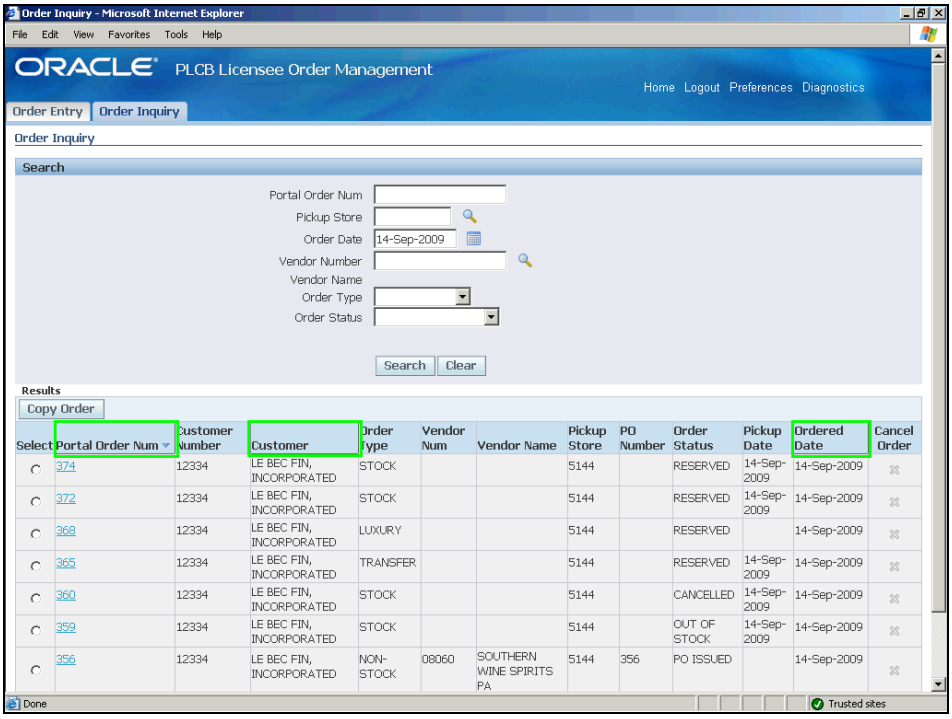
Step	Action
1.	**To complete this procedure, login to the *Order Management Portal* and select the PLCB LICENSEE ORDER MANAGEMENT responsibility.**



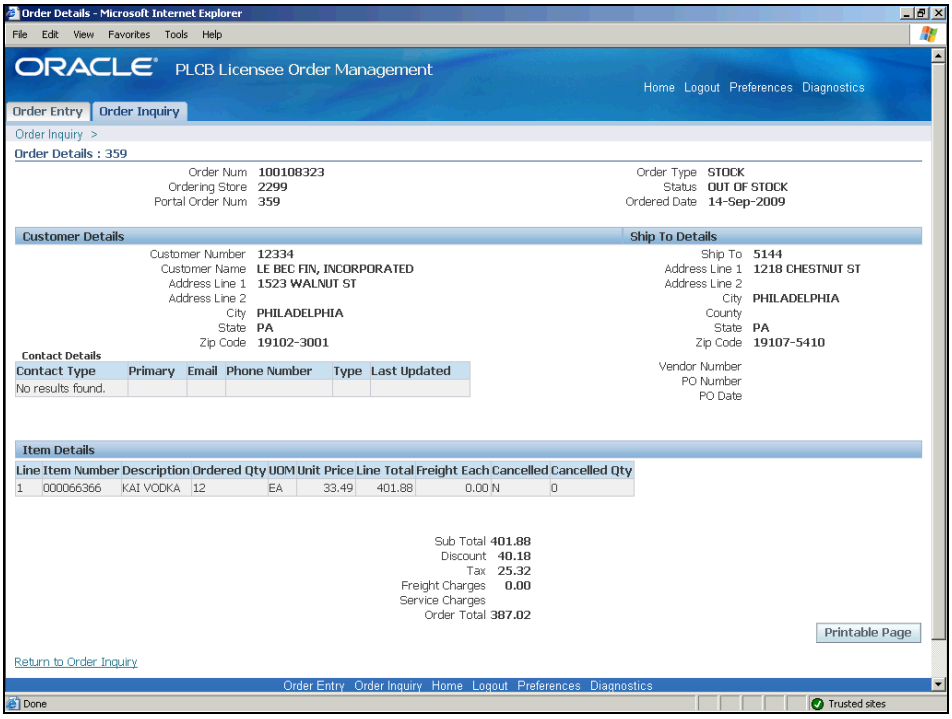
Step	Action
2.	**Click on the *Order Inquiry* tab.** Order Inquiry



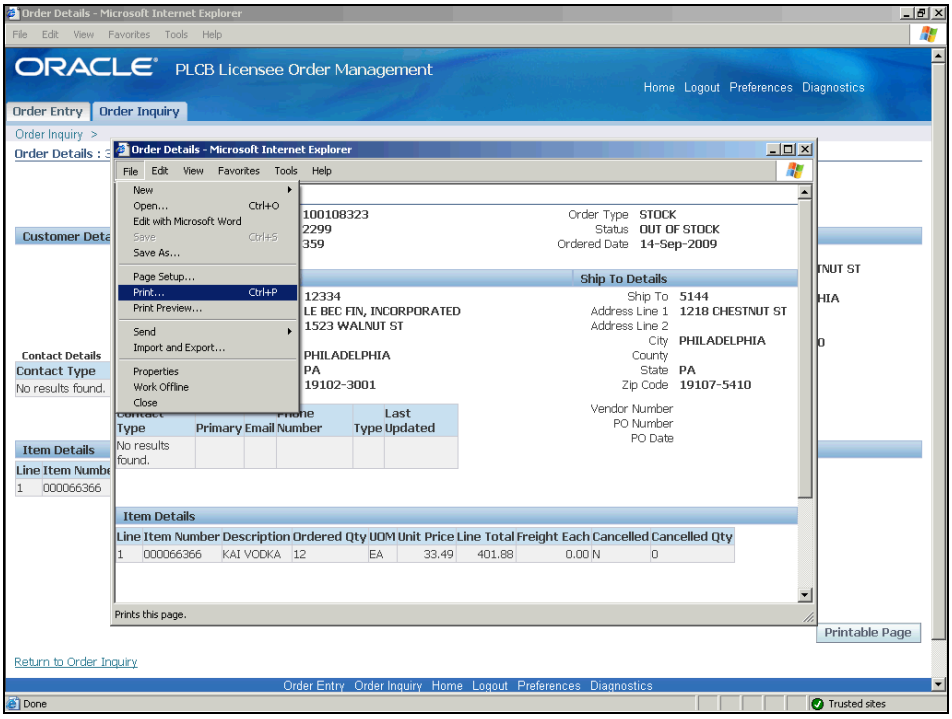
Step	Action
3.	**Use any of the fields in the *Search* section to enter a search criterion.** **Select the appropriate search parameter(s).**
4.	**Enter or select the appropriate search value(s).**
5.	**Click on SEARCH.** Search



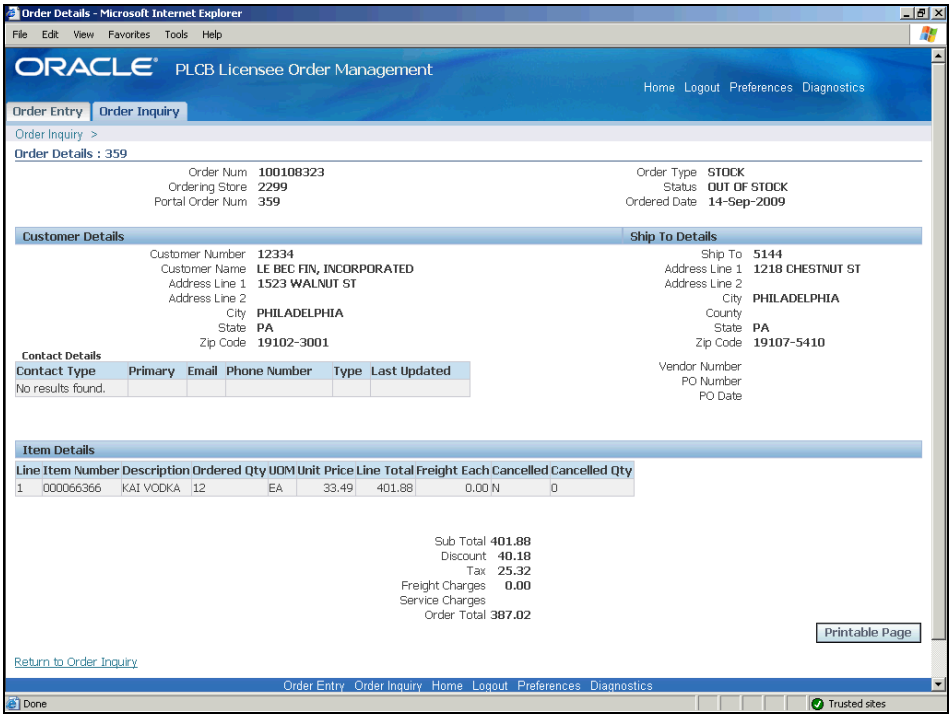
Step	Action
6.	**The search results display in the *Results* section.** **If desired, click on any of the column headings with the bold borders, such as: PORTAL ORDER NUM, CUSTOMER, and ORDERED DATE to sort the results accordingly.** **To view the details of an order, click on the associated link in the PORTAL ORDER NUM column.** 359



Step	Action
7.	**The order details for the selected order are displayed. View the required information.** **Optionally, click on the PRINTABLE PAGE icon to open the order in a printable version and print it.** Printable Page



Step	Action
8.	**A printable version of order displays in a separate browser window.** **To print the order, follow the menu path: FILE > PRINT.**
9.	**After printing the order, close the window displaying the printable version of the order.** [x]



Step	Action
10.	**Review the order details and return to the *Order Inquiry* form.** Return to Order Inquiry
11.	**Click on CLEAR to clear the search results.** Clear
12.	**End of Procedure.**

Copy an Order

Procedure

Description:

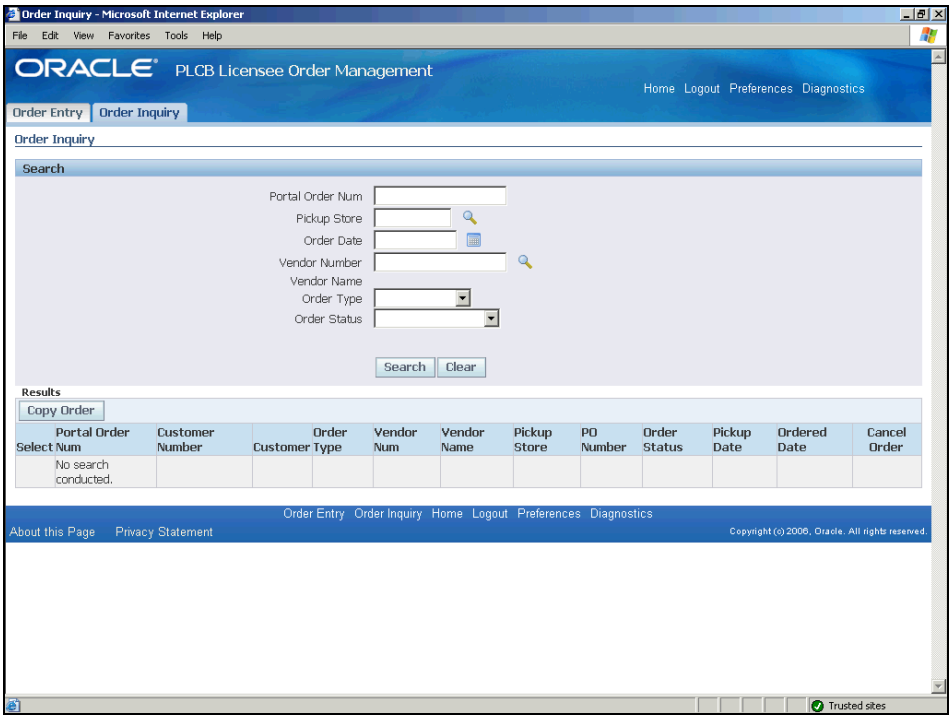
Use this procedure to copy an existing order to create a new order.

Oracle Prerequisites:

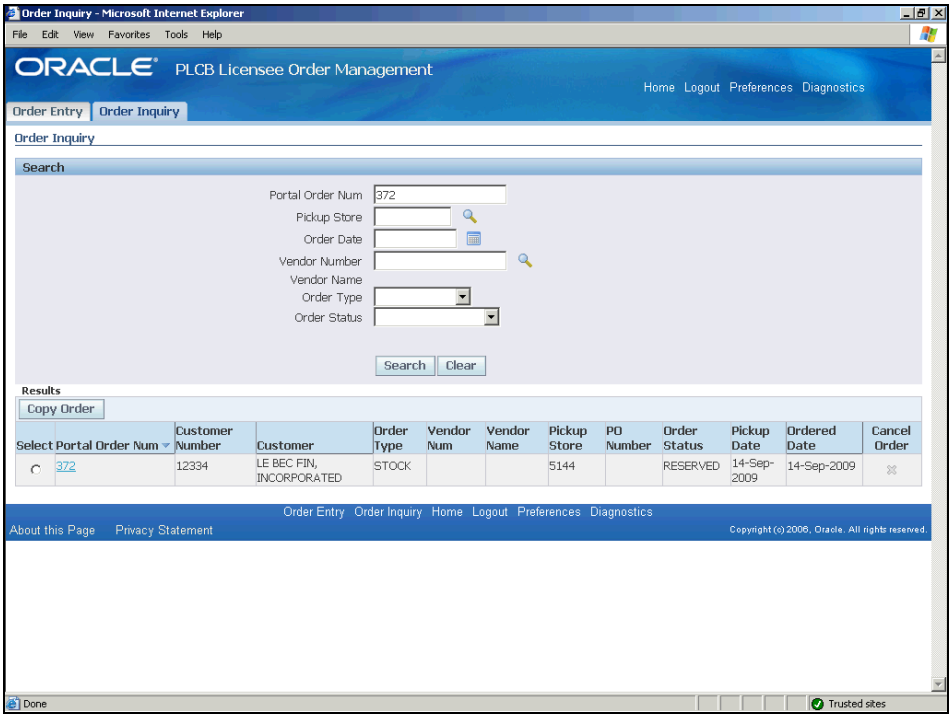
- **The licensee must exist in the system.**
- **The order must exist in the system.**
- **The order must be created using the *Order Management Portal*.**

Step	Action
1.	**To complete this procedure, login to the *Order Management Portal* and select the PLCB LICENSEE ORDER MANAGEMENT responsibility.**

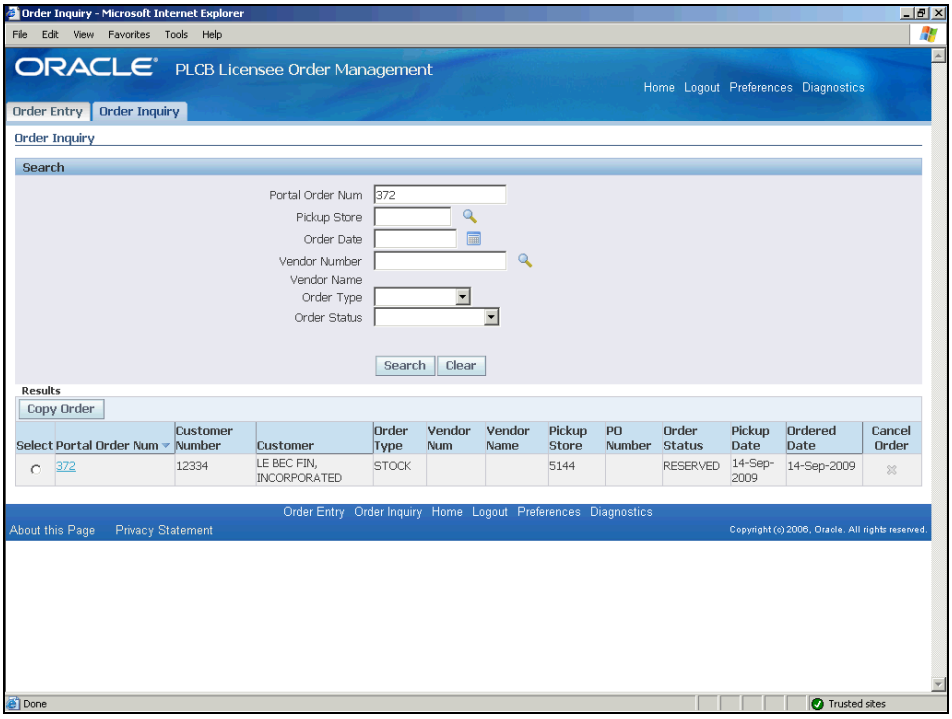
Step	Action
2.	**Click on the *Order Inquiry* tab to search for the order to be copied.** Order Inquiry



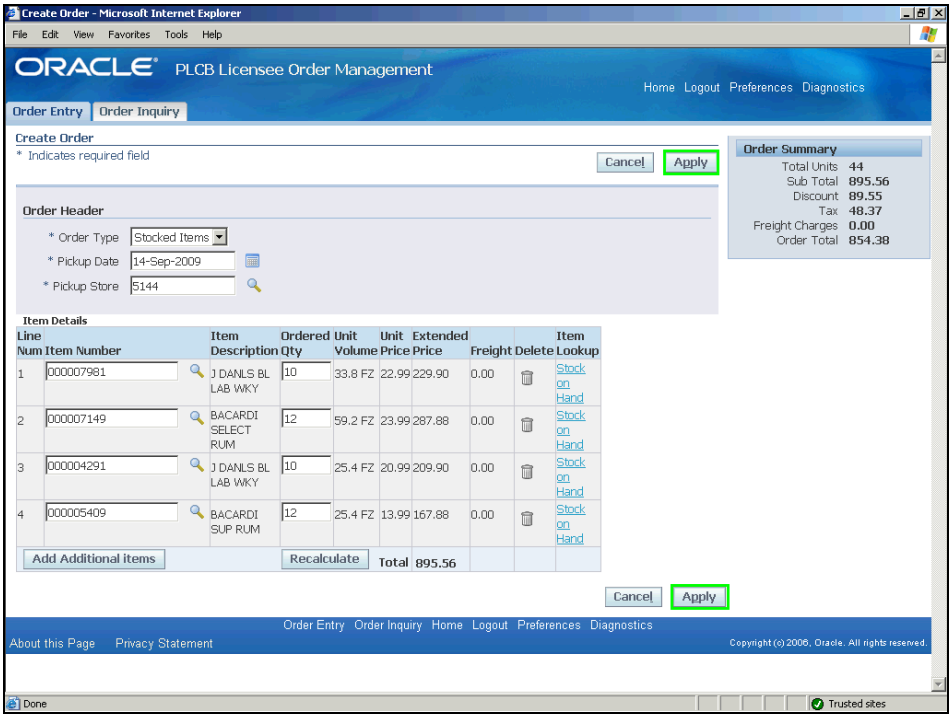
Step	Action
3.	**Use any of the fields in the *Search* section to search for the desired order.** **Select the appropriate search parameter(s).**
4.	**Enter or select the appropriate search value(s).**
5.	**Click on SEARCH.** Search

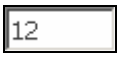


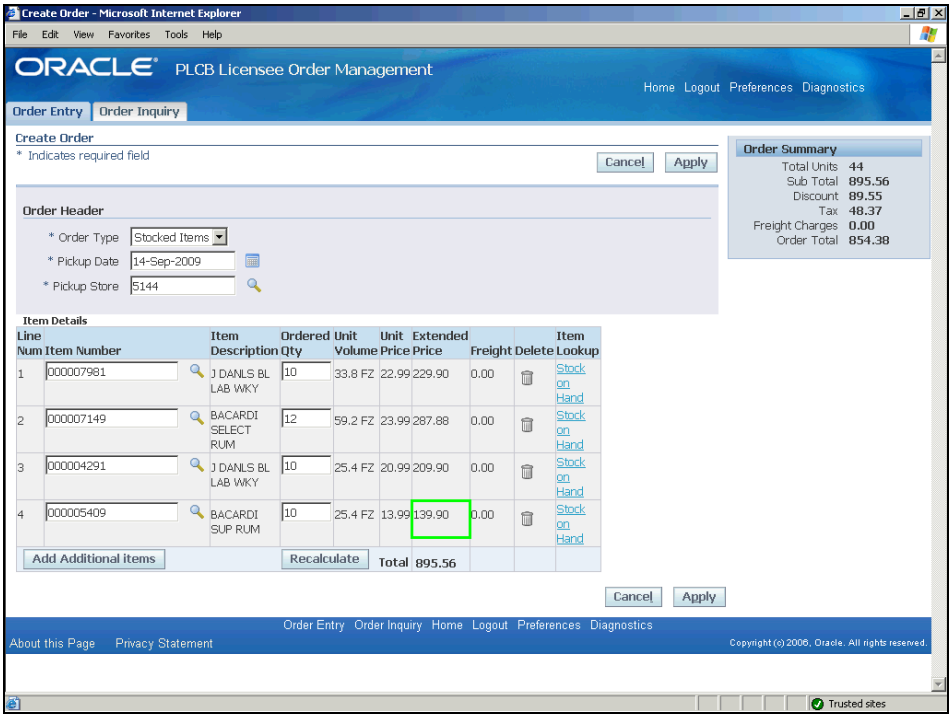
Step	Action
6.	**If desired, click on the link in the PORTAL ORDER NUM column of the order to be copied to view its details.** 372
7.	**View the information and return to the *Order Inquiry* form.** Return to Order Inquiry



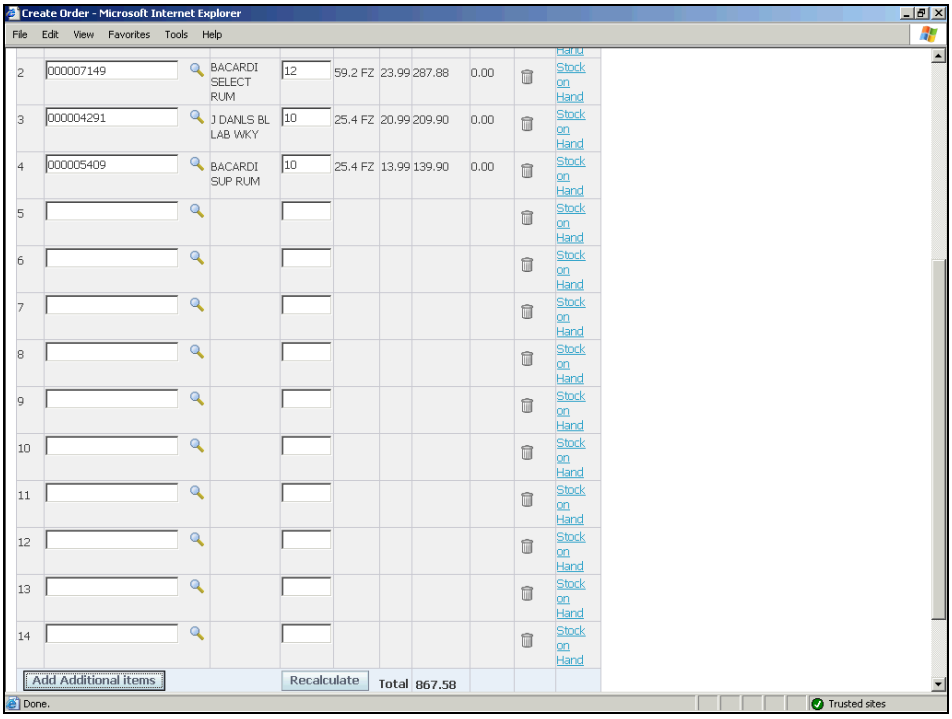
Step	Action
8.	**Select the order to be copied.**
9.	**Click on COPY ORDER.** Copy Order



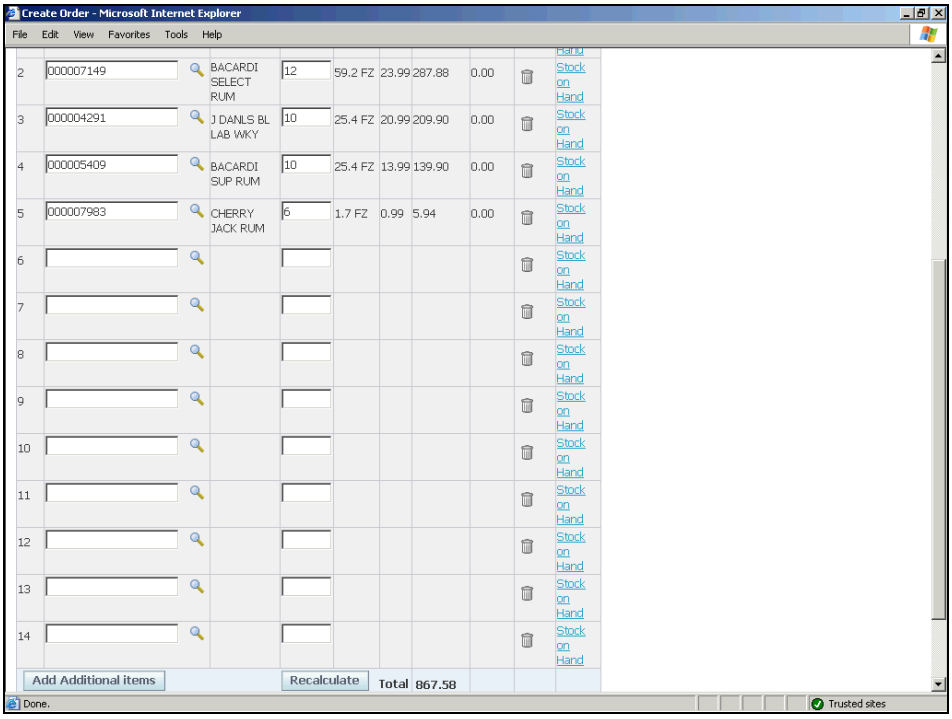
Step	Action
10.	**Verify the information and make any changes if needed. To create an exact same order, click on APPLY now.**
11.	**To change the order quantity for an item, double-click in the ORDERED QTY field.** 
12.	**Enter the desired quantity.**
13.	**Press the [Tab] key on the keyboard.**



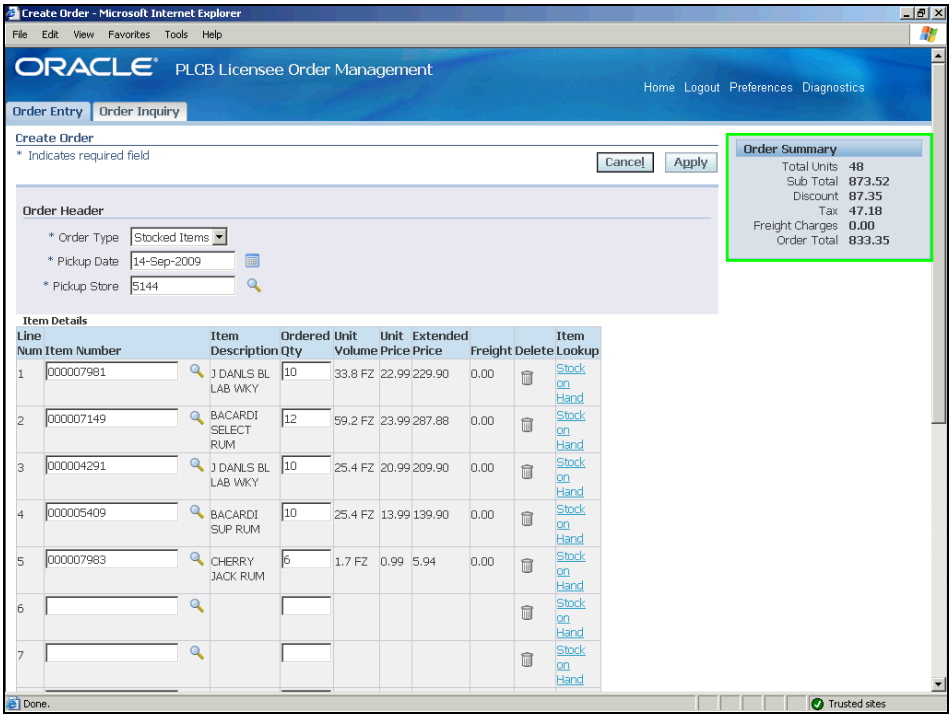
Step	Action
14.	**Click on ADD ADDITIONAL ITEMS to add more items to the order.**



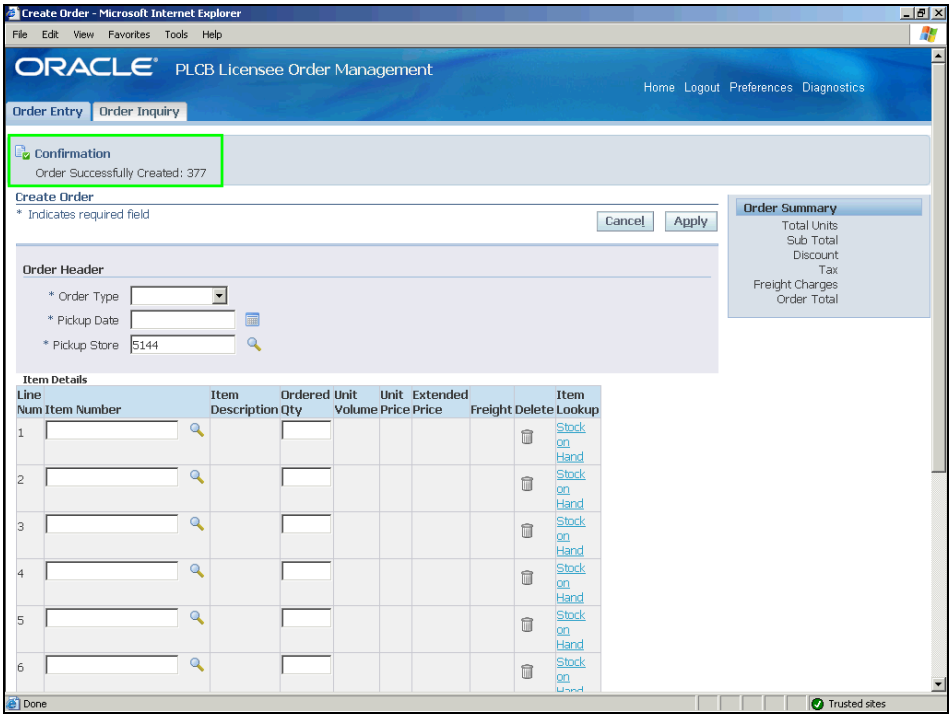
Step	Action
15.	**Activate the ITEM NUMBER field in the next available line.**
16.	**Enter the appropriate item number or use the search option to look for the desired item.**
17.	**Press the [Tab] key on the keyboard.**
18.	**Press the [Tab] key on the keyboard again.**
19.	**Enter the quantity to be ordered in the ORDERED QTY field.**
20.	**Press the [Tab] key on the keyboard.**



Step	Action
21.	**Similarly, make all the required changes.** **When done, click on the RECALCULATE to calculate the new order totals.** Recalculate
22.	**Scroll up the window to view the *Order Summary* section.**



Step	Action
23.	**Review and verify the numbers in the *Order Summary* section and click on APPLY to create the new order.**



Step	Action
24.	**The new order is successfully created using the existing order.** **Note the assigned portal order number and if desired, use the *Order Inquiry* form to view the details and status of the new order at any time.**
25.	**End of Procedure.**