

Grocery Outlet Inc

One Network Appointment Scheduler

User Guide: Order Management

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1 Introduction

- The Grocery Outlet Appointment Scheduler project forms part of a larger ERP revamp within the Grocery Outlet business. The appointment scheduling functionality will serve as an extension to the ERP suite being updated and will be dependent on the go-live of the SAP ERP, since order integrations that initiate the appointment scheduling logic will be purpose built to be delivered from the new ERP solution.
- As part of this project, the following functionality will be provided:
 - Confirmed Order Integration
 - Including Auto-ASN creation
 - Appointment Scheduling
 - Appointment Policy Configurations
 - Advanced Appointment Scheduling
 - Automated Appointment Scheduling
 - Appointment Mgmt.
 - Live & Drop Appointments
 - Supplier & Carrier Partners
 - Appointment Confirmations & Rescheduling
 - Integrated Appointment Details
 - Outbound to Talend for integration with ERP, WMS & TMS
 - Capacity Management
 - Site & Dock Door Group Capacity Tracking
 - Capacity Setting Management

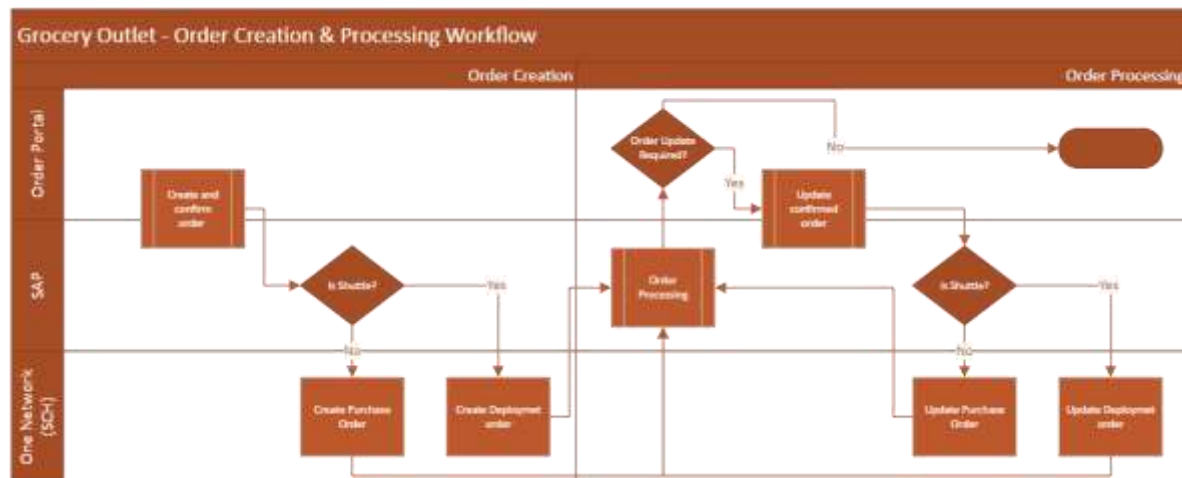
2 Order Overview

2.1 Purchase Order Overview

2.1.1 Context

ACTIVITY PURPOSE	This activity enables system users (including partners) to access Purchase Order information and enable planning and scheduling activities
ACTIVITY INITIATORS	
ACTIVITY PREREQUISITES	
ACTIVITY PERFORMER(S)	Any Buyer Orchestrator role user of GO
OTHER PARTIES INVOLVED	
ADDITIONAL INFORMATION	
ACTIVITY OUTCOME	A user can search PO in Open State and see attached Shipment to it.

2.1.2 Process Flow



2.1.3 System Steps

The Enhanced Order model supports both Purchase Orders and Deployment Orders in ONE Network. Purchase Orders correspond to purchase of goods /materials in order to fulfill the growing demand. Deployment Orders is used to reposition stock within the same organization for redistribution purposes.

Enhanced Orders in One Network have a four-level model containing:

- Order Header
- Order Line
- Request Schedule
- Delivery schedule

Step 1: Searching a Purchase Order

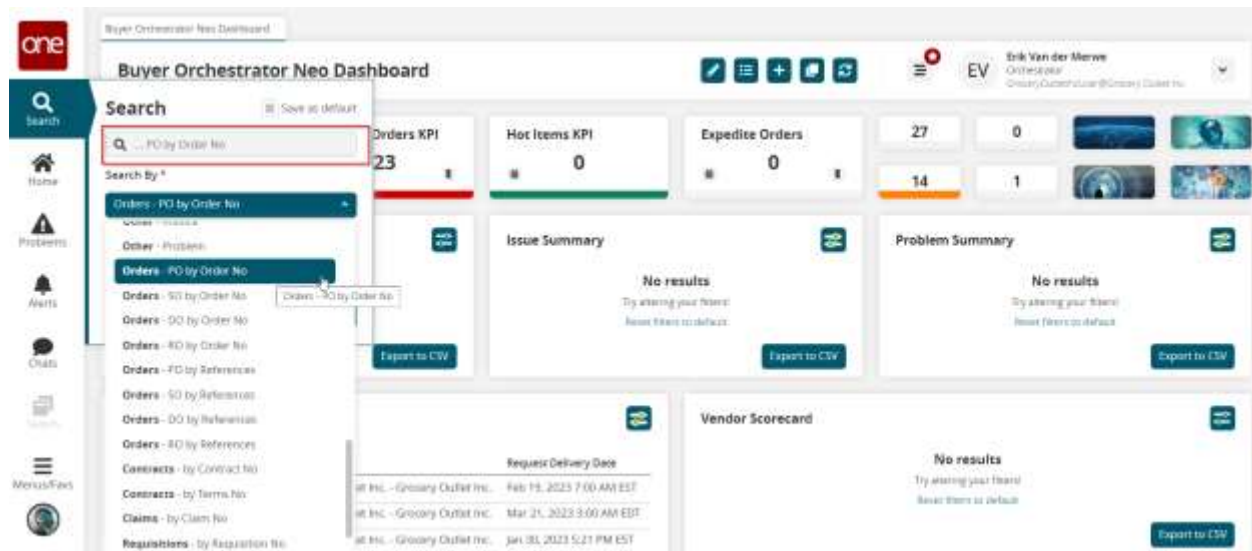
A User can search Purchase Order in the ONE network system.

To Search for a Purchase Order :

2.1.3.1 Global Search using NEO UI

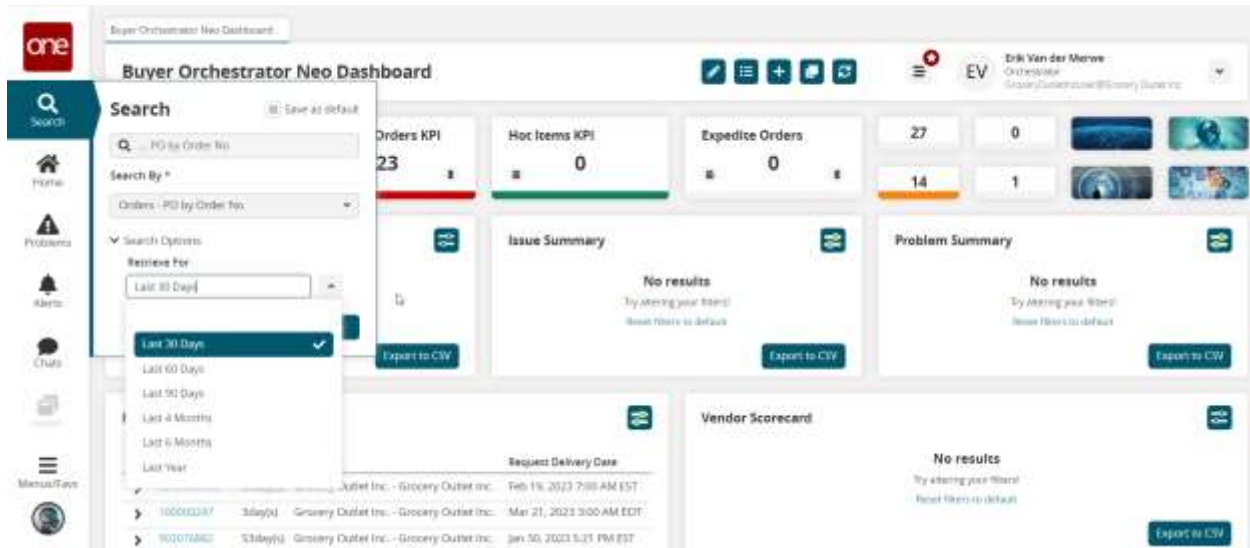
The global search option on NEO UI provides the user the ability to search the shipment directly by variety of search keys for shipments.

1. Login to the One Network system and use the NEO UI.

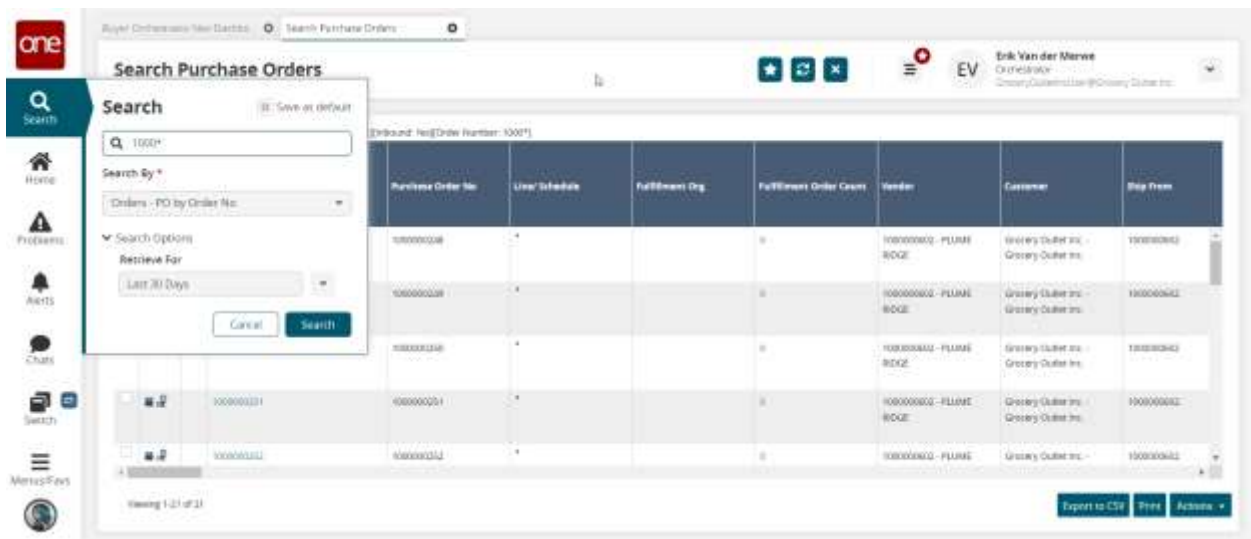


2. Select the **Search** icon, a **Search** slide out appears for you to enter your search criteria.

In the Search By field, please choose the correct drop-down choice such as "Orders – PO by Order No" .

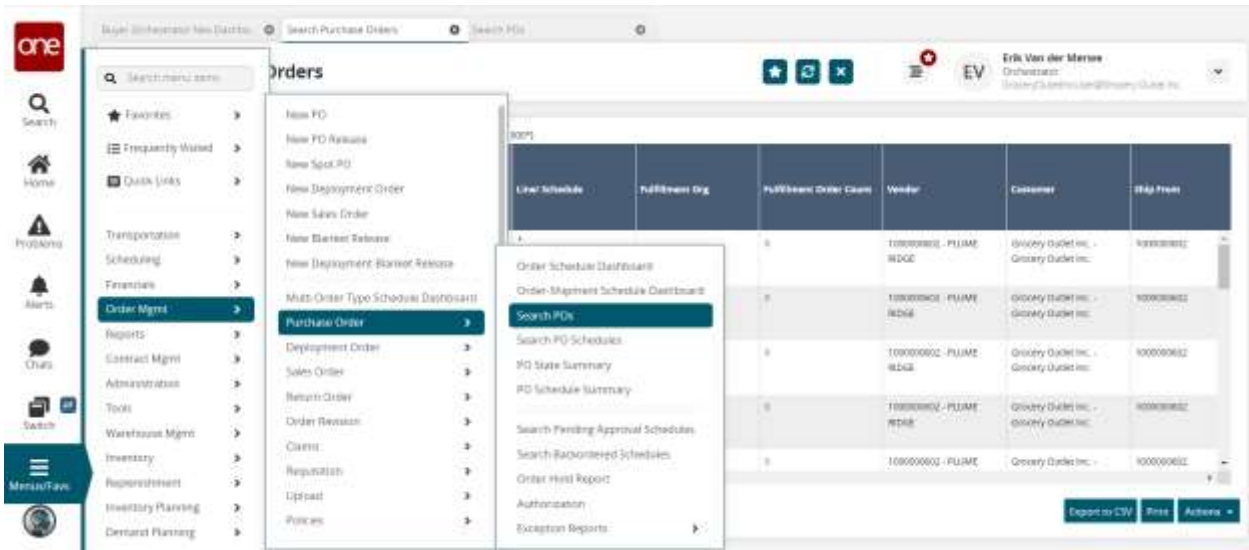


3. Click the **Search Options** link to see the **Retrieve For** field. The default choice is “Last 30 Days” – if you want to look for Shipments or Movements whose Pickup Date is older than 30 days, select one of the other choices from the drop-down list.
4. Enter your search value (PO Number) in the **Search** field and then press the **Search** button on the **Search** slide out or press the **Enter** key on your keyboard.
5. **IMPORTANT** – When entering your search value in the **Search** field, you can enter a wild card symbol if you do not know or do not want to enter the entire value. The wild card is the asterisk (*) symbol, and you can enter it either before or enter it after the value.



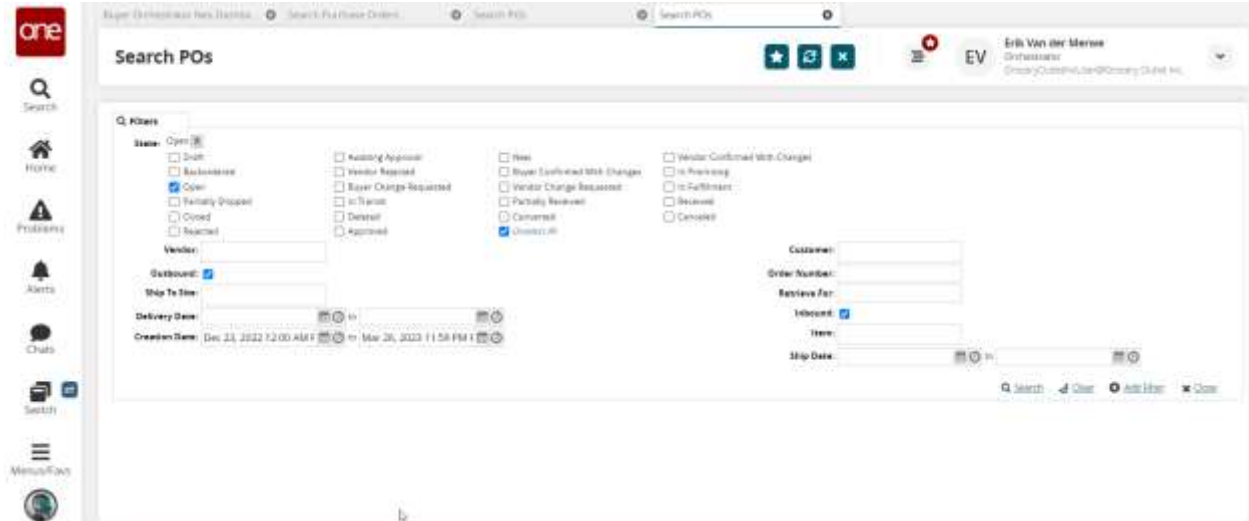
2.1.3.2 Using Search PO option

1. A user can navigate **Menu -> Order Management -> Purchase Order -> Search Pos**



2. **Search POs** screen appears.

3. A user can search by selecting " **Open State** " of PO in filters. Also, can add multiple search criteria like **Vendor Name , Order No. , Ship to Site details , Delivery Date, Ship date** etc.



4. The Search result displays all the **PO in Open state**.

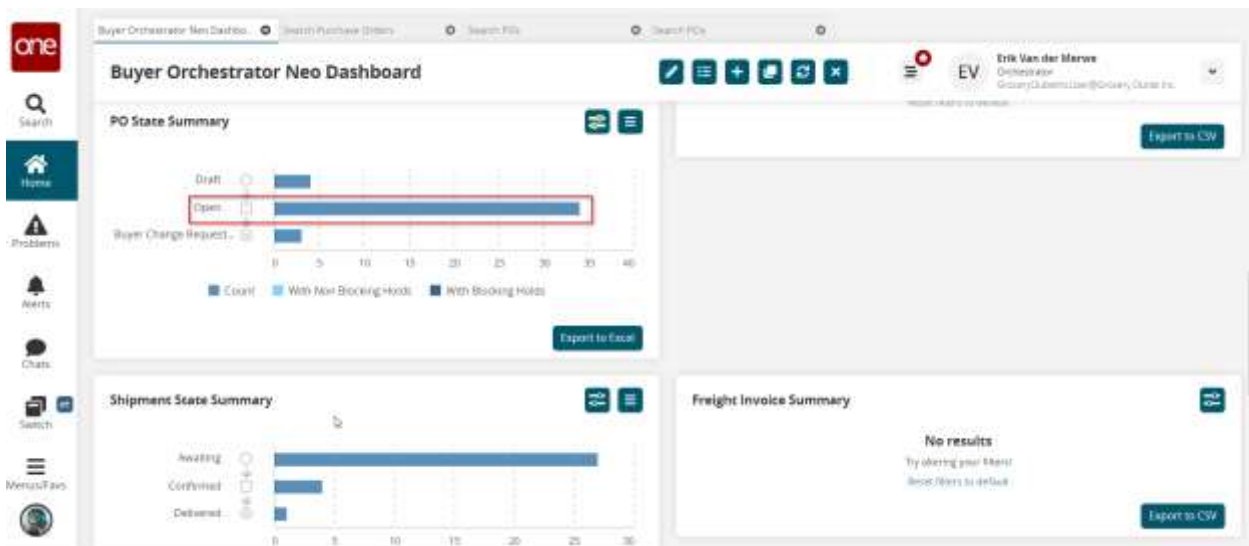
The screenshot shows the 'Search POs' interface. The search criteria are: Filter: Incls, 30terkwid, YESOvalen Del, Del: 23. 2023, 12:06:44 PM PST - Mar 28, 2023, 11:58 PM PST, keyword: YESOvalen Opval. The table below lists several purchase orders, all of which are in the 'Open' state.

	Order	Purchase Order No.	Line/ Schedule	Fulfillment Org	Fulfillment Order Count	Vendor	Customer	Ship From
	450001924	450001924			0	100000001 - CG ROAMNE	Grocery Outlet Inc - Grocery Outlet Inc.	CG ROAMNE DC
	10000192	10000192			0	100000001 - CG ROAMNE	Grocery Outlet Inc - Grocery Outlet Inc.	CG ROAMNE DC
	10000192	10000192			0	100000001 - CG ROAMNE	Grocery Outlet Inc - Grocery Outlet Inc.	CG ROAMNE DC
	10000192	10000192			0	100000001 - CG ROAMNE	Grocery Outlet Inc - Grocery Outlet Inc.	CG ROAMNE DC
	10000192	10000192			0	100000001 - CG ROAMNE	Grocery Outlet Inc - Grocery Outlet Inc.	CG ROAMNE DC

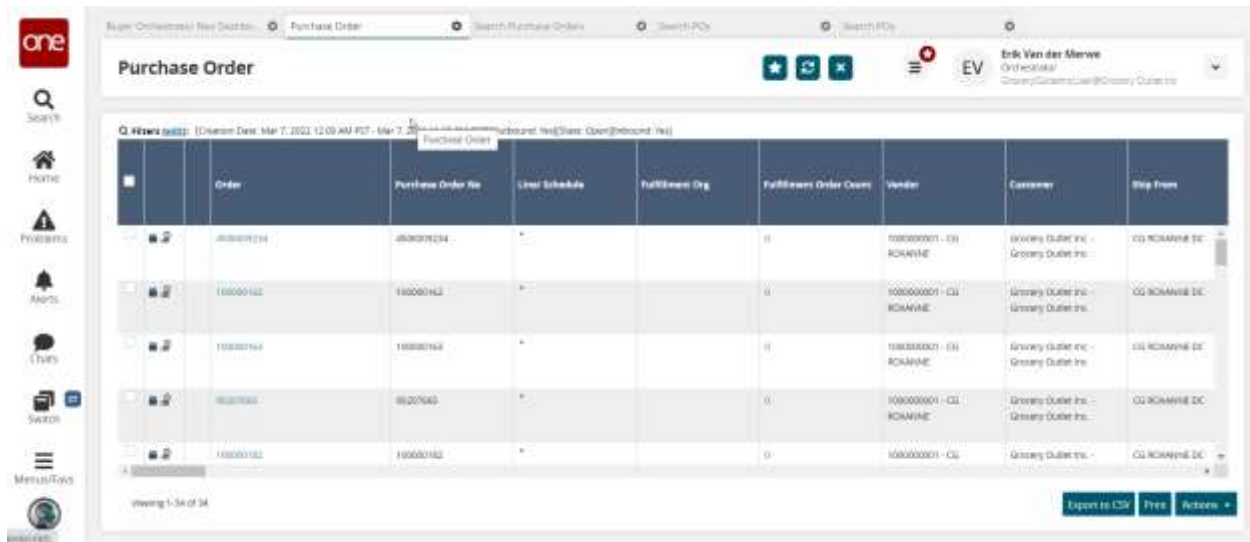
2.1.3.3 PO State Summary Report

The user can navigate to the ONE dashboard and to the **PO State summary** widget. All Purchase Orders can be viewed on the PO State Summary page per 'State'. The feature allowing the user to click any given 'state' where the PO in the corresponding 'state' will be displayed.

For Grocery Outlet, PO in Open state is capable of Scheduling appointments. GO user needs to search only "Open State PO"



- On clicking open state PO bar , all the PO in open state will be displayed.



2.2 Viewing PO details

2.2.1 Context

ACTIVITY PURPOSE	To enable user to view the Shipment and Appointment scheduled with PO.
ACTIVITY INITIATORS	
ACTIVITY PREREQUISITES	A PO in open state
ACTIVITY PERFORMER(S)	Any Buyer Orchestrator role user
OTHER PARTIES INVOLVED	
ADDITIONAL INFORMATION	
ACTIVITY OUTCOME	Any user can view details of PO and any shipment associated with it.

2.2.2 Process Flow

N/A

2.2.3 System Steps

Step- 2 : A user can view the details of PO.

1. Navigate to Search PO screen by following Step -1 (any of the 3 options).

The screenshot shows the 'Purchase Order' search results page. The table contains the following data:

Order	Purchase Order No.	Line Schedule	Fulfillment Org	Fulfillment Order Count	Vendor	Customer	Ship From
4506009234	4506009234			0	100000001 - OG KDUANE	Grosby Outlet Inc - Grosby Outlet Inc	OG ROMANIE DC
100000102	100000102			0	100000001 - OG KDUANE	Grosby Outlet Inc - Grosby Outlet Inc	OG ROMANIE DC
100000103	100000103			0	100000001 - OG KDUANE	Grosby Outlet Inc - Grosby Outlet Inc	OG ROMANIE DC
100000104	100000104			0	100000001 - OG KDUANE	Grosby Outlet Inc - Grosby Outlet Inc	OG ROMANIE DC

2. Now click on any **PO #** and view the details of PO.

The screenshot shows the details of purchase order 4506009234. The order is for Grosby Outlet Inc, vendor KDUANE, and is scheduled for delivery on Jan 30, 2023. The table below shows the line items:

Line/Reference	Purchase No./Line No.	Item	Shipped Qty	Delivered Delivery Date	Carrier	Estimated Ship Date
100000001023423456	450600923400101	Sealed Hubs	10000 Each	Mar 8, 2023 3:01 PM EST		Mar 22, 2023 4:01 PM CST

3. The following field details can be seen (* - Mandatory fields)

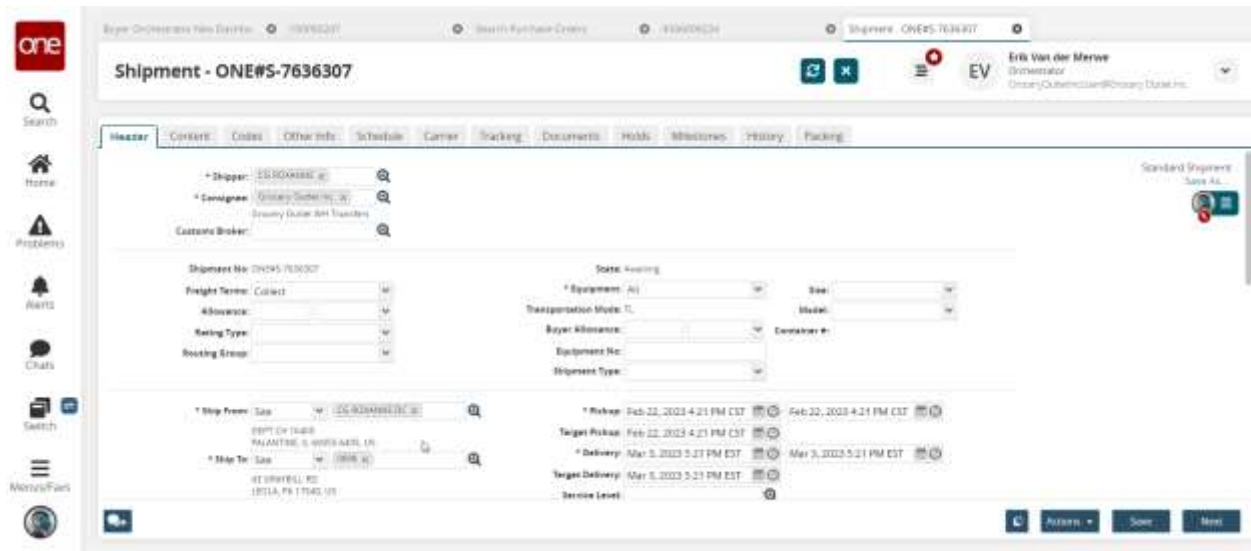
Purchase Order Header

Field Name	Description
Order Number	Unique number for the order assigned by the system.
*Buying Org	The organization that is creating the purchase order.
*Ship To (Drop-down menu)	Filter for the Ship To location. The available options are My Site, My Partner Site, and My Location.
*Ship To (Text box)	The name of the location receiving the shipment.
Ship To Address	Non-editable Ship To address field. Populated by Ship To selection.
Ship To Location Address	This field is auto-populated.
*Trans Mode	The mode of transport for the purchase order creation.
Request Delivery Date	The date on which the Shipment is requested to be delivered.
Request Ship Date	The date on which the purchase order is requested (by the buyer) to be shipped (by the vendor).
State	The state of the purchase order.
*Vendor	The vendor associated with the purchase order. The vendor must be listed on the Vendor Master List.
*Ship From (Dropdown menu)	Filter for the Ship From location. The available options are Vendor's Site, Vendor's Partner Site, and Vendor's Location.
*Ship From (Text box)	The name of the location sending the shipment.
Ship From Address	Non-editable Ship From address field. Populated by Ship From selection.

Purchase Order Line:

Field	Description
Line Number	Unique Line number for the line within an Order.
Item	Name of the Item being ordered
Ext Item Name	External Name of the item being ordered.
Unit Price	The price per unit.
Currency	The Currency to be used for the payments
Line Amount	Unit Price * Request Qty

2. Click on **Shipment no.** hyperlink.



Step- 4: To View/Create Appointments for this shipment.

Navigate to **Shipment # -> Schedule** header

