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Our 4 Mainframe Screens and Their Functions:

IT30

- Check stock
- Get ETAs of when titles will be received into the warehouse
- Check Customer info

OE01

- Place orders
- Check Customer info

OEBP

- Check the status of an order placed 'today'
- Make updates to available orders
- Re-send order confirmations

OM60

- Check order history
- Check backordered and committed titles
- Release/Cancel backorders or make modifications to backorder shipping/warehouses
- Check Customer info

Checking Stock (IT30)

Target Points

- ✓ Intro to IT30
- ✓ Regular Titles
- ✓ Greenlight Titles
- ✓ Lightning Source Titles
- ✓ Titles with On-sale Dates
- ✓ Mega Titles
- ✓ Short Discount Titles
- ✓ Non-Returnable Titles
- ✓ Publisher OS Titles
- ✓ Publisher OSI Titles
- ✓ Not Yet Received Titles
- ✓ Valid/Not Stocked Titles



IT30-Stock Status Screen

IT30 is the Inventory/Account Inquiry screen that we use most in Customer Care. This screen gives us real time stock status for all distribution centers and provides discount information that is specific to an account.

After entering the account information, the cursor will automatically tab to the TC field to begin a search. We do an inquiry on a title by typing its title code, ISBN, EAN or title

Our options are listed on the last two rows of the screen. We can look up a title simply by typing the first few characters in the title. This activates a list of titles starting with the characters that we typed.

The six ways we use most often to access product are:

- **Title name** – enter this by typing the title and selecting the letter of the corresponding item
- **ISBN (International Standard Book Number)**
- **Author** – type @ followed directly by the author's last name, then select the corresponding item
- **UPC (Universal Product Code)**
- **Title Code (speedy number 6 to 7 digits)**
- **Keyword search** – type the keyword and select the letter of the corresponding item

The screen below displays a search for the book “Where the Red Fern Grows”.

- The section of the screen outlined in yellow gives account information and information about the item you searched
- The section of the screen outlined in red lists our warehouse availability as well as the retail price

```

IT30 03/07/18      ~~~~~ INVENTORY/ACCOUNT INQUIRY ~~~~~ JULIAN 18/066 TIME 10:38
ACCT 20G2278_____  CUST NAME: READMORE BOOK STO DC: C/N IPS:   DIV: IBC/BK
TC 0139940_____  TITLE WHERE THE RED FERN GROWS  AUTHOR RAWLS WILSON
ITMID 000139940/000000000 DP Q CAT CJ  SCAT FI  UPC 0710090059904
EAN 9780440412670      INV      7.99 BUY W RBS  GL      ONSALE 09/17/96
PUB DELJ/0263      ISBN 0-440-41267-6  PUBOT 0917      CUSRTN R 00/00/00
      PTO N B00 N      CTN      48 L 7.50 W 5.10 H 0.90 WGT 0.40
WAREHOUSE  ATS  PRICE  ETA  O/O  B/O  C/BO  P/L  SF ST
N-LAVERGNE  356  7.99      0    0    0    16    Y
B-AlLENTOWN  0    7.99      0    0    0    0     B
C-CHAMBERS  309  7.99      0    0    0    1     Y
D-FT WAYNE  95   7.99      0    0    0    0     Y
E-ROSEBURG  179  7.99      0    0    0    1     Y
F-FAIRFIELD  0    7.99      0    0    0    0
H-JACKSON   0    0.00      0    0    0    0
J-FRESNO    0    7.99      0    0    0    0
A-DIGITAL   0    0.00      0    0    0    0

LIMIT                IPS LIMIT:                RESTRICTED BY:
ENTER: ITMID ISBN TITLE @AUTH $CAT %PUB #UPC +SKU =KW >KW !SCAT
F3-End F2-Annot F5-ItmFwd F6-Disc F7-IB14 F9-Cust F10-Prv F11-Nxt
  
```

After we have pulled up a title for the customer, the information we supply for each title is:

- Title (always repeat back to customer)
- Provide warehouse information and quantity
- Price & Discount

Department Product Codes (DP) determine what format a product is. A complete list of Product Codes can be found on [iKnow](#)→Sites→Customer Care→Tools and Mainframe Reference

Product	Product Code
Hardcover, Hardback, Trade Cloth	R
Quality Paper, Trade Paper	Q
Mass Market, Paperback, Rack Size	P
Calendars, blank books, other sideline items	T
Audio Books	W
Computer Software or Media	S

Video (including DVD)	K
Music	X
Gifts, Cards, other non-book items	M

Distribution Centers

Location	DC Code
LaVergne, TN (Stocks all – Warehouse and PTO)	N
Chambersburg, PA	C
Ft. Wayne, IN	D
Roseburg, OR	E
Allentown, PA (PTO)	B
Fresno, CA (PTO)	J
Fairfield, OH (PTO)	F
Jackson	H
Digital	A

IT30 “Keys” to Remember (function keys are listed at the bottom of each Mainframe screen)

Keyboard functions	Purpose
F11	Next
F10	Previous
&	Takes you Back to your search results
*	Takes you Back to your search results
F5	Title code forward (if the book is not the most current edition)
F6	Discount / toggles back to stock stats
F9	Customer information
F7	IB14
@	Starts an author search
=	Starts a Keyword search
F2	Annotation (more info about the product)

If the customer would like more information about the book, (number of pages, brief annotation, etc.), you can find this by using the F2 key.

When searching for a title by author (@), you can use up to 8 characters

Here are all of the IT30 fields listed in order from top to bottom and left to right.

ACCT	IBC/SA/ILS/INTL account number or customer's telephone number
CUST NAME:	Name associated with the account number
WHSE	Customer's primary and secondary DC assignments
DIV	Customer's division type
TC	Title code search field
TITLE	The Title
AUTHOR	The Author's Name where applicable. May be listed as "edited" or "various" for books without a single author or for dictionaries and other reference work.
TCODE	The Title Code/ Title Code Forward. When a book is reissued the title code for the new issue is here. This forces new requests for this title code to be entered as requests for the forwarded title code. To view the new title on IT30, use the F5 Function Key.
DP	The book's Dept.-Product Code*
CAT	The Subject Category Code *
SCAT	Spring Arbor Subject Category Code*
UPC	12 digit number. Universal Product Code that is usually found on music and videos.
EAN	European Article Numbering. 13 digit number that is unique to the product and is used in the DC to identify the product.
INV	The inventory price. Never quote the inventory price to a customer. Always use the distribution center-specific price for price quotes.
BUY	The Code for the Buyer who is responsible for purchasing this product. *
RBS	Retail Basic Stock Code *
ONSALE	The day that the bookstore can sell this book to the public. Ingram will ship titles with on-sale dates in

	advance so that the bookstore will have available for sell on that date.
PUB	The publisher abbreviation and ISBN prefix.
ISBN	The book's ISBN (International Standard Book Number)
PDATE	The Publication Date
CUSRTN	The date by which the customer should return books to Ingram to receive credit. Some NYR titles will show non-returnable until a purchasing decision is made and product is ordered.
PTO	Print to Order. This indicates whether a title is printed through Lightning Source. A "Y" indicates that it is.
BOO	If a Y appears, this alerts the buyer to purchase only if a backorder has been placed.
IPS	If a Y appears, this indicates that the title may be ordered through Ingram Publisher Services.
CTN	Carton quantity
L W H	Length, Width, Height of book
WGT	The weight of the book.
WAREHOUSE	Distribution Center Names and Codes*
ATS	The number of units Available to Sell
PRICE	Retail price of the books stocked at this Distribution Center.
ETA	Estimated time of Arrival (when the book will arrive in the warehouse.) Note: Press F7 and look at the date ordered and lead-time for a more accurate timeframe to communicate to the customer.
O/O	The number of units we have on order with the publisher.
B/O	The number of units that our customers have backordered.
C/BO	The number of units currently held for customers as the result of an earlier backorder.
P/L	The number of units on a picking list and in the process of being shipped.

- SF Stock indicator. Answers the question: "Will this Distribution Center be restocking this title?" An "Y" indicates that it will. Such titles are said to be "Y-flagged".
- ST Status Code * A full list of Stock Status abbreviations can be found by going to the Customer Care Team site:
**iKnow→Sites→Customer Care Team
Site→Mainframe Tools→Mainframe Stock Status Abbreviations**
- DISC F6 to see the Discount field. The discount information is specific to the account. This section will provide the discount percentage based on the customer's current TOS (Terms of Sale) flag, VOR participation, Division, and/or ordering method.
- LIMIT: This field will display any quantity limits that have been set for that specific account. These limits are typically set for National Accounts.
- RESTRICTED BY: This field will inform you if the customer is restricted from ordering that particular title. Also, the word RESTRICTED will appear below the ATS field if the title is not available for that customer.

*See iKnow for codes.

F7 Key – IB14 Screen – provides information about ETAs, date of Ingram’s last order, etc

IB14 11/07/16		~~~~~ INVENTORY INQUIRY ~~~~~		TIME 09:20	
WHSE LAVERGNE		~~~~~ COMPLETE RECORD ~~~~~		JULIAN 16/312	
TITLE	RED	DEWEY	917.92	ISBN	0-375-72518-0
ITEM ID	001720923/000000000	3 STRIP	DQTY 0	EAN	9780375725180
AUTHOR	WILLIAMS TERRY TEMPE	SLASH	QTY 0	UPC	
PUBLISHER	VINT 0249	CURR DEMAND	0	SKU	
LIST PRICE	15.95 PC P	PER1 DEMAND	0	6 LEAD	1.53 TEXTBK X
AVG COST	7.98 MM Y	PER2 DEMAND	0	7 DATE ORD	10-25-16
INVOICE PRICE	15.95 2	PER3 DEMAND	2	1ST RECV DT	09-24-02
RETAIL PRICE	15.95 GL	PER4 DEMAND	0	8 ON SALE	10-08-02
STATUS	10-20-09 SAF Y RBS	MTD SALES	0	PUB ETA	01-00-00
BUYER W	LSI N PTO N DCP N	YTD SALES	0	ROP	0 MAX 0
DEPT Q	CONSIGN IPS N	LYR SALES	12	PCAT	CNTY US
ON HAND QTY	1	CUST RETURNS	0	PUB DISC	500 CODE 7
1 ON ORDER QTY	0	PUB RETURNS	0	ICAT NA	SCAT
BACKORDER QTY	0	LAST SALE	10-18-16	CBA IMP	IND
COMMITTED BO QTY	0	4 PUB DATE	10/08/2002	DUMP FLAG	CTN 24
OPEN PICK LIST QTY	0	5 RECV 11-02-16	PREV 09-22-16	MS Y	CSRT R PBRT R
RECV-N-STKD QTY	0	ADD 05-29-02	UPD 08-21-15	BO-ONLY	N MUST DS
RESERVE QTY	0	L 8.10 W 5.18 H .65	SELL-DN	N	
PKMS LOCK QTY	0	WEIGHT C 0.47 LB	CND MSRP	18.95	N
WHSE/TCO	ISBN TITLE BAUTH \$CAT %PUB #UPC +SKU -KW >KW &RET	PKMS	ADJ	0	
9 N	001720923	DSP	C/S	CAT	

The number on the following page correspond to each item in this screenshot.

In the left hand column, the most common fields (that are not present on the main IT30 screen) you’ll be using are:

- 1. On Order Qty** – this is the amount that are currently on order. You will see the date that these were ordered in the right hand column (**Date Ord**)
- 2. MM** – The Media Mail field indicates if the ISBN is approved to be sent via Media Mail

In the center column:

3. **Strip** – Is the book strippable? When a book is “strippable”, it means that for overstock returns, the customer only needs to return the cover of the book. This is common for paperbacks.
4. **Pub Date** – This is the publication date of the book
5. **Recv** – this is date that we last received the product. You will see the date that these were ordered in the right hand column (**Date Ord**). Use these field in conjunction with the **Lead** column to determine if we have received the title within the expected time frame

In the right hand column:

6. **Lead** – Indicated the amount of time, in weeks, that it takes for the ISBN to arrive once our buyer has ordered it. i.e. 1.53 = about a week and a half (but we’d round up to tell our customers, “About 2 weeks”)
7. **Date Ord** – Indicates the last date that our buyer has ordered this ISBN
8. **On Sale** – Indicates the street date of the ISBN
9. **At the bottom left had corner of the screen, you’ll see the warehouse code (N, C, E, etc.) listed in green along with the title code. The information in IB14 is specific to whichever warehouse is set in this area. You may change the warehouse code, and this will then change the IB14 information to reflect the selected DC. You may also update the title code from this area.**

F9 – Customer Information Screens - (there are 3 pages to this) – lists all customer specific setting and contact info

F9 page 1

```

DE71          CUSTOMER MASTER DISPLAY INFO PART 1          03/05/18
SHIPTO: 2089560/000452971 WORLD OUTREACH CHURCH          SAN: 8009090
BILLTO: 2089560/000452970 WORLD OUTREACH CHURCH          SAN: 8009090
CUST TYPE: FH CHURCH          DIV: SA /SA
DC   MON  TUE  WED  THU  FRI  SAT  SUN
1  NV DF- 12:00 12:00 12:00 12:00 12:00          07:00 CUTOFF OPT: R
   DD DF- 11:00 11:00 11:00 11:00 11:00          CUTOFF OPT: R
2  PTO DELAY: N          FF-CD
3  SCDY DELAY: N          BA-7 FUEL SCG: N
4  OT W SCH-DEL          SL- ORDER TYPE: TN TRADE NORMAL - RETAIL ACCOUNTS
          SPCL SHIP RLSE DAYS ILS SVC SL- IPAGE:          Y
          1: 3: 4:          0 SL- DC PAIRS IND:          Y
          8 AFF ON FILE: Y          SL- PTO IND:          B11
          SL- 3RD SHOP ELIG:          Y
          PL PRICE SUPPRESS CD: P          SHORT DISC CODE:
          9 CLASS OF TRADE: RT          SL- SPLIT LINE IND:          N12
TOS: Y          VOR: EXPD 10 IPS ALLOWED:          Y          SL- GREENLIGHT IND:          Y
5 B/O CANCEL DAYS: 60 IPS ONLY:          N          SL- CARD LABEL CODE:          R
NYR DAYS:          0 IPS PUBLISHER:          N          SL- PRICE LABEL MASK:          N
BA- AUTO B/O CANCEL:          Y IPS / IBC COMBINE:          Y          PARTIAL SHIP IND:          P 13
CREDIT HOLD:          REASON:          TC.FWD.EXCL:          SL- MIN UNITS:          0
BA-6 IFSI: Y          AFFILIATOR:          SL- MIN AMT:          .00
EO FMT:          EO METH:          ASN TYPE:          ELECTRONIC IND:          Y
          F3-RTN F6-DFLT SHP F9-PT2 F10-IPS F12-AR
          14          15
  
```

Please make note of the following fields in the screenshot above:

Column 1:

1. Primary and Secondary DCs and daily cut-off times for each
2. **PTO Delay** – if flagged as Y, the PTO title will be delayed in shipping by 1 day
3. **SCDY Delay** – if flagged as Y, the order from the secondary DC will be delayed in shipping by 1 day
4. **Scheduled Delivery** – if content is listed in this field, this means the customer only ships out certain days per month. (If nothing is listed like we see above, then products ship out as normal). To view a document on how to interpret schedule delivery codes, please go to **iKnow→Sites→Customer Care Team Site→Mainframe Tools→Mainframe Scheduled Delivery Codes**
5. **BO Cancel Days** – The amount of days we wait to receive an item that is on Backorder. If it is not received with the amount of days listed, it will be cancelled from the order
6. **IFSI** – if flagged as Y, the customer is set up to do Direct to Home shipments (B2B)

Column 2:

7. **Fuel SCG** – if flagged as Y, a fuel surcharge (currently \$1.50) will be charges on shipments that receive free freight
8. **AFF on File** – if flagged as Y, the Customer may purchase Street Smart titles, and they should ship to arrive prior to the on-sale date
9. **Class of Trade** – Lists the customer's class of trade

10. **IPS Allowed / IPS Only / IPS Publisher / IPS / IBC Combine** – lists if a customer is an IPS customer or publisher as well as if their orders may combine with IBC orders

Column 3:

11. **PTO IND** – indicates how and when a PTO title will ship

Customers may be set up with one of the following On Demand indicators (F9 on OE01/OM60):

A- PTO (print to order) titles will predict in-stock any item that is marked as PTO. When these customers order an item that must be printed, the ENTIRE order will wait until the book is printed and the entire order will ship together.

B - PTO titles will predict in-stock any item that is marked as PTO. Orders for these customers will be in two boxes but will ship the same day.

Y- PTO titles that are not in stock will automatically backorder for the customer. We would tell the customer that this item is being placed on backorder. Item will release within 8 to 15 days or next order placed, whichever comes first.

N- We will only backorder PTO items if the customer specifies B/O on the incoming PO. The backorder will be treated just like a b/o for the 'Y' type customers.

It takes up to **12 hours** to print a book for a “A” or “B” on demand indicator customer.

It takes **72 hours** to print a book for a “Y”, “N” or “blank” on demand indicator customer.

They are printed **LaVergne, TN/Allentown, PA and Fresno, CA.**

Coded with a “Y” in the **PTO** field on IT30. Stock listed is not literal, nor does it represent a printing maximum.

12. **Split Line** – if flagged with a Y, it means the system will automatically pull stock from the secondary DC as well if stock cannot be completely fulfilled from the primary DC
 - a. **Partial Ship IND** – if flagged with a P, the system will allow the system to accept the order if only part of it available (i.e. Customer wants 10 of a certain item, but we only have 6 in stock. If Partial Ship IND is P, then the customer will be able to get the 6 that are in stock. If Partial Ship IND is N or blank, then the system will place all 12 on BO)

13. **MIN Units / MIN AMT** – If something is listed then the customer's order will not ship until the minimum amount of items or the minimum dollar amount has been reached (per DC)

Bottom of the screen:

14. **F6 – DFLT SHP** – indicates default shipping methods
15. **IPS** – IPS Specific info (to be covered in a later training)

F9 – page 2

This page lists:

- The customer's contact information
- The customer's Ingram representatives
- Their terms of sale (how they pay for orders)
- Their last 12 months sales / returns

F9 – page 3

(We are not using anything on this page)

Reading the IT30 Stock Screen

```

IT30 03/07/18      ~~~~~ INVENTORY/ACCOUNT INQUIRY ~~~~~ JULIAN 18/066 TIME 10:38
ACCT 20G2278_____ CUST NAME: READMORE BOOK STO DC: C/N IPS:   DIV: IBC/BK
TC 0139940_____  TITLE WHERE THE RED FERN GROWS      AUTHOR RAWLS WILSON
ITMID 000139940/000000000 DP Q CAT CJ   SCAT FI   UPC 0710090059904
EAN 9780440412670      INV      7.99 BUY W RBS  GL   ONSALE 09/17/96
PUB DELJ/0263      ISBN 0-440-41267-6  PUBOT 0917      CUSRTN R 00/00/00
      PTO N BOO N          CTN      48 L 7.50 W 5.10 H 0.90 WGT 0.40
WAREHOUSE      ATS      PRICE      ETA      O/O      B/O      C/BO      P/L      SF ST
N-LAVERGNE      356      7.99          0          0          0          16          Y
B-AlLENTOWN      0        7.99          0          0          0          0          B
C-CHAMBERS      309      7.99          0          0          0          1          Y
D-FT WAYNE      95       7.99          0          0          0          0          Y
E-ROSEBURG      179      7.99          0          0          0          1          Y
F-FAIRFIELD      0        7.99          0          0          0          0
H-JACKSON        0        0.00          0          0          0          0
J-FRESNO         0        7.99          0          0          0          0
A-DIGITAL        0        0.00          0          0          0          0

LIMIT              IPS LIMIT:          RESTRICTED BY:
ENTER: ITMID ISBN TITLE @AUTH $CAT %PUB #UPC +SKU =KW >KW !SCAT
F3-End F2-Annot F5-ItmFwd F6-Disc F7-IB14 F9-Cust F10-Prv F11-Nxt
  
```

- The area outlined in yellow displays information about the account and the ISBN or title searched
 - ACCT – Where you enter your customer’s Ship To account number
 - Cust Name – Account name of your customer
 - DC – The warehouse pair that is assigned to the customer
 - DIV – Division of the Customer (Note: You may need to press F9 to view if the customer is also set up to use IPS)
 - TC – Enter the ISBN, Title Code (TC), UPS, EAN, or any of the search options displayed in the **Enter** line in the bottom of the screen
 - Title – Title of the item searched
 - Author – Author of the item searched
 - ItemID – The Title Code (TC) will display here
 - DP – Department Product Code (displays the format of the item – see page 4)
 - CAT – Category of the item
 - SCAT – Spring Arbor category (not used by IPS)
 - UPC – UPC of the item
 - EAN – EAN of the item
 - INV – Our price for the item

- BUY – Buyer code of the item
- RBS – (not an IPS field)
- GL – (not an IPS field)
- OnSale – On Sale date (Street Date) of the item
- PUB – Pub number
- ISBN – ISBN of the item
- PUB – (Not an accurate Pub Date – Please see F7 for an accurate Pub Date)
- CUSRTN – Shows returnability of a title (Please note that returnability is account specific for IPS, and this field is NOT account specific)
 - R indicates a title is returnable
 - R with a date after it indicates that a title is returnable until that date
 - Z indicates a title is non-returnable
 - N indicates a title is no longer returnable
- PTO – indicates if a title is Print to Order
 - If a title is PTO, the stock shown will not be literal, but it will be an indication that we can print the title
- BOO – indicates if a title is Back Order Only (our buyer orders it only when a customer placed an order for it)
- CTN – shows how many will fit in a carton
- L W H -- shows the length, width, and height of a title
- WGT – shows the weight of the item
- The area outline in red shows stock availability
 - Warehouse – lists each of our DCs
 - ATS – Available to Sell (Shows how many of the item are available to sell at each DC. This is in real time. It displays the actual number of items that are sitting on warehouse shelves)
 - Price – Retail price (before discount). To see the discount, press F6
 - ETA – If an item is On Order (O/O), there *may* be an ETA listed here. If there is not, please check F7
 - O/O – Shows how many of the title we currently have On Order
 - B/O – Shows how many copies of the title are currently on Backorder
 - C/BO – Shows how many copies of the title are currently Committed to customers (these would have previously been on BO)
 - P/L – Shows how many copies of the item are currently on the Pick List (being picked and packed)

- SF – Stock Flag field that shows if a warehouse carries a title
 - NOTE: The ONLY character that indicates we stock a title is the letter Y. If you see ANY other character, it means we DO NOT STOCK that item
- ST – Stock Status field will show the status of the title (i.e. NYR, OP, etc)

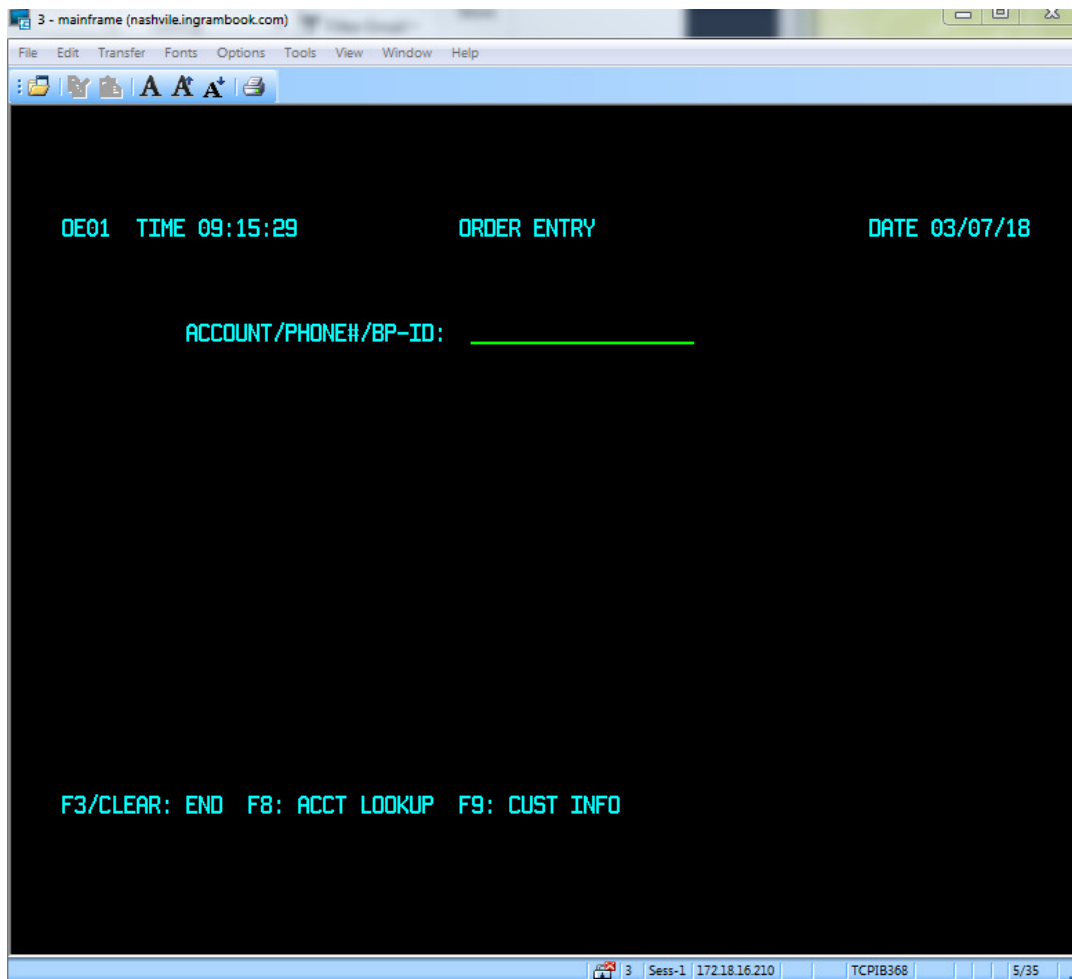
Order Entry (OE01)

Target Points

- ✓ Account Validation
- ✓ Direct to Home
- ✓ F9 Customer Info
- ✓ Shipping Information
- ✓ Order Validation/Order Header Info
- ✓ Order Validation/Order Entry
- ✓ Updating and Canceling Titles
- ✓ Duplicate Order/Titles
- ✓ Recap Screen



Order Entry Screen



Main OE01 Screen

OE01 is the Order Entry screen. It is the application that we use most. The chief purpose of OE01 is for entering a customer's order

Two functions of the OE01 application are:

- **Order Entry**
- **Verify Account Info**

The three ways we can access a customer's account are:

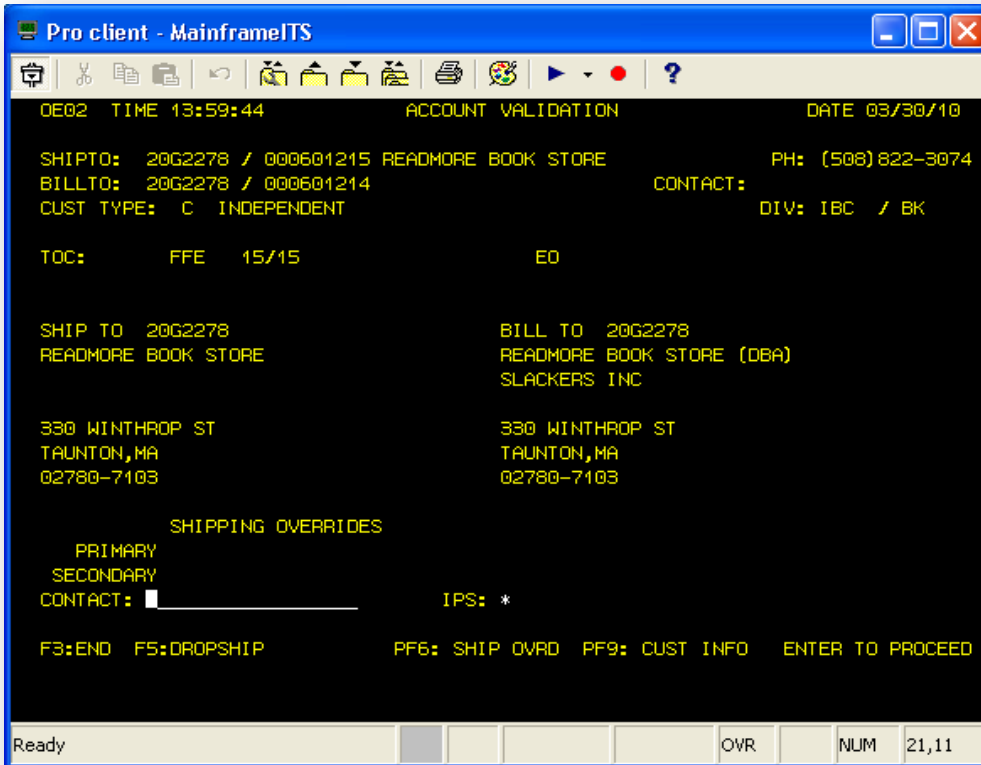
- **Business Partner ID (BP ID)** (9 digit number referenced that begins with 000; e.g. 000554591)
- **Account number (use the Ship To number)**
- **Area code + telephone number**

Customer Search

If you are unable to find the account by one of these means, you may use **F8** to open a screen where you can search for your customer by their store name, or you can search for the account in ipage

In OE01 press F8 to key an account name and press enter to get a list of accounts—see below.

```
OE77 TIME 07:44:24          CUSTOMER ACCOUNT SEARCH          02/26/18 PAGE 00001
NAME: BARNES                PHONE:                SAN:
CITY:                       ST:      ZIP:        COUNTRY:
-----
S BILLTO  SHIPTO  NAME                                CITY          COUNTRY
ST ZIP
- 2084995 2084995 BARNESYARD BOOKS INC                STOCKTON
      RETURNS DEPT                    NJ 085591516 UNITED STATES
- 2088246 2088246 BARNES & CONTI ASSOC INC            BERKELEY
      RETURNS DEPT                    CA 947102537 UNITED STATES
- 2001138 2001138 BARNES & NOBLE DISTRIBUTION          WESTBURY
      DEPT #1926721 ETB                NY 115909010 UNITED STATES
- 2001138 2001139 BARNES & NOBLE DIST                  RENO
      12660 OLD VIRGINIA RD STE A      NV 895213963 UNITED STATES
- 2001138 2008936 BARNES & NOBLE DISTRIBUTION          RENO
      CDF ORDERS SAN#1927833           NV 895213963 UNITED STATES
- 2001138 20M7484 BARNES & NOBLE DISTRIBUTION          RENO
      CDF ORDERS SAN# 1927833          NV 895213963 UNITED STATES
- 2001140 2001140 BARNES & NOBLE INC                    WESTBURY
      DEPT 192673X CASEPACK            NY 115909010 UNITED STATES
- 2001140 2001141 BARNES & NOBLE DIST                  RENO
      12660 OLD VIRGINIA RD STE 3      NV 895113963 UNITED STATES
MESSAGE:                               S=SELECT F3=RETURN F7=BACK F8=FWD
```



OE01 Account Validation Screen

After an account is accessed in the system, it is important to verify the information is correct.

Important information that must be verified each time an order is placed:

- **Name of store**
- **City and State**
- **Shipping instructions (shipping standard?)**

To proceed to the next screen the representative must indicate if the order is IPS: **Y** or **N**

If the customer wishes to change the shipping instructions, press F6 for options and select the shipping instructions for the order. **Shipping changes must be entered at the beginning of the order.**

To view the account's standard shipping instructions from OE01, press **F9** to get to Customer Info, and then **F6** to view Default Shipping.

At times, Customers may request that they pick up their orders. Please view the **DC Customer Pickup Information** document on our team site for address, phone numbers, and hours of pick-up.

NOTE: For **Backorders**, please be aware that when the customer is selecting Air Shipping, in order for the shipping instructions to remain the same, you are required to change the **SI** field to "N". (**Change BO Release flag to R for immediate release**)

Direct to Home (B2B)

To being a Direct to Home or B2B order in OE01, you should press **F5**

```
OE40  TIME 09:34:53      CONSUMER ADDRESS ENTRY      DATE 03/07/18

SHIPTO: 20N4757 / 000692829 PREPBOOKS.COM LLC      PH: ( ) -
BILLTO: 20N4757 / 000692828      CONTACT:
CUST TYPE: IN INTERNET BOOKSTORES  NON CDF      ZIP: 89423 DIV: IBC / BK
NAME: _____
ADDR1: _____
ADDR2: _____
ADDR3: _____
ZIP: _____ CITY: _____ ST: ___ CTRY: ___
PHONE: _____

- Charles AparicioChavarria      MIAMI      2018-03-07
- Ingram Book      LAVARGNE      2018-03-07
- Brandon Chick      SPRING BRANCH      2018-03-07
- Ingram Book      LAVARGNE      2018-03-07
- LEANN POPE JOHNSTON      BAYTOWN      2018-03-07
- Ingram Book      LAVARGNE      2018-03-07
- Lafathia Daniels      NEW HAVEN      2018-03-07
- Ingram Book      LAVARGNE      2018-03-07
- rosario davi      LINCROFT      2018-03-07
- Ingram Book      LAVARGNE      2018-03-07

S=SELECT      F3=END  F4=GIFT
```

The screen above shows the drop ship fields.

By pressing F3, the user is returned to the Account Validation screen.

If you enter an incorrect address, you may receive the following messages:

CITY, STATE AND ZIP ARE REQUIRED

STREET NOT IN ZIP - PLEASE CONFIRM

HOUSE NOT FOUND ON STREET - PLEASE CONFIRM

(once you are certain the address is correct you can press F3 and proceed with order)

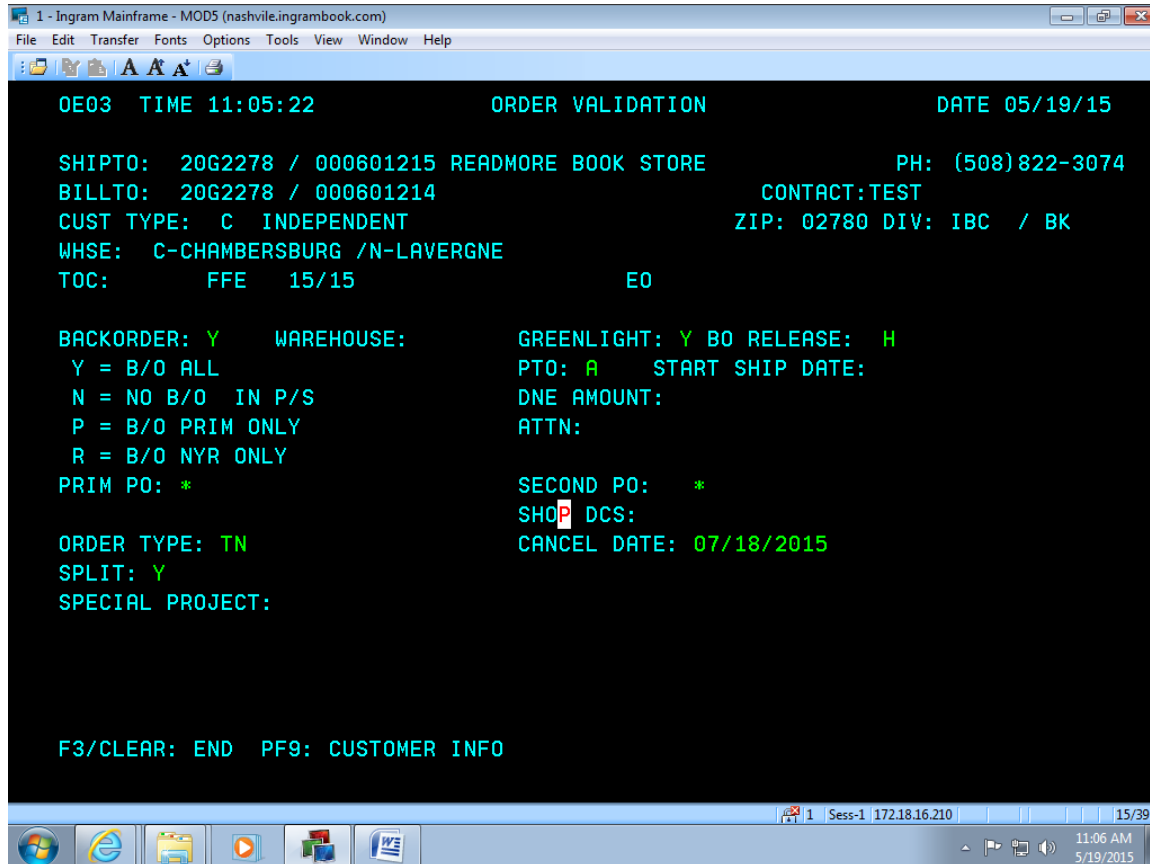
If the address was accepted the following screen will indicate: **DROPSHIP INFORMATION ACCEPTED**

You may press F4 to choose gift wrapping of to enter a gift message of 255 characters or less

You can also select from the last several drop ship addresses used. To select one of the entries listed, type **S** on the red line to the left of the entry. The address information will populate into the address fields that are listed above

Placing Orders in OE01

Order Validation/Order Header



OE01 Order Validation Screen

The order validation screen is where all information specific to the current order is entered. The information on this screen may be easily changed each time the customer orders. Each of the areas listed below has options the customer may choose.

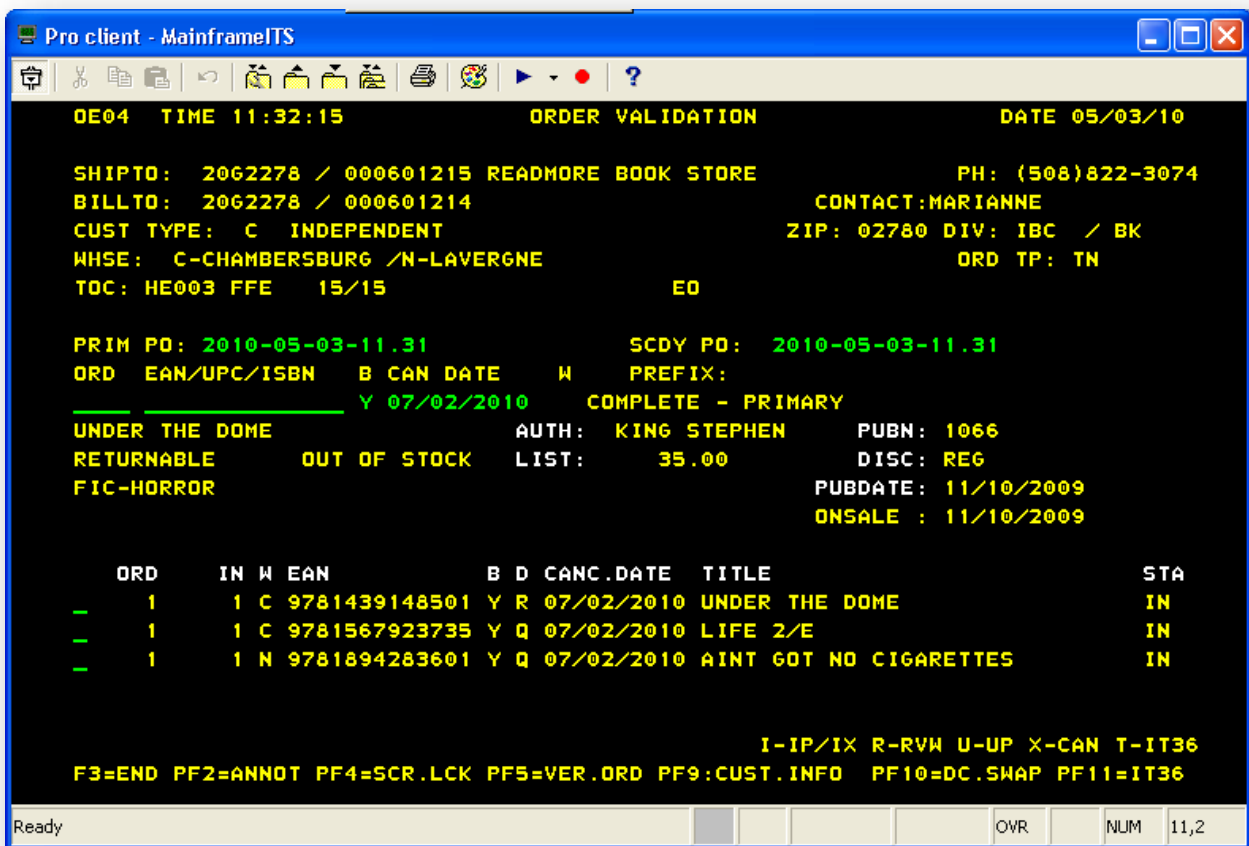
Backorder	Enter Y to automatically backorder (B/O) all out of stock and not yet received (NYR) titles. Enter N for no automatic backorders. Enter R to automatically B/O all NYR titles only.
Warehouse	Indicate the DC from which the customer would like to have an order shipped. If left blank, the order will be pairs yes. Warehouse codes are N, D, E and C.
GL Greenlight	We do not have to ask customers about this. If they mention they do not wish to order these titles, enter N for no Greenlight titles.

BO Release Change	Enter an “R” if a customer requests to have BO automatically shipped once the backordered books are received. This may void free freight if less than 15 items are shipping. An “H” will have the backorders hold and ship with the next combinable order or wait out the backorder clock.
PTO	The customer’s default PTO flag may be changed for this order only. Permanent changes should be submitted via an Account Maintenance form.
Start Ship	Primarily an IPS field at this time. Indicates the date product should begin shipping
DNE Amount	Do not Exceed feature primarily used by our Ingram Library Services customers. Only LS, EF or RF order types may be used for a Do not Exceed order.
ATTN	Attention line added to shipment—may only be used with a non-combining order types (TU, TI, etc).
Primary PO	Enter customer’s request. The PO number can be whatever the customer chooses. There are certain chain accounts that have other requirements for this field. Most customers use the date. If no PO number is entered, the date and time will automatically appear as the PO. Note: PO numbers are limited to 22 character spaces
Secondary PO	Enter the customer’s secondary PO number. The secondary PO number applies to books that ship from the secondary DC. If left blank, the primary DC PO number will automatically be used.
Shop DCS	By entering Y, the order will shop all four DCs based on the zip code of the customer. Leaving the field blank defaults to regular primary/secondary shopping. This shouldn’t be done without consulting with a member of leadership. Primarily used by IPS and for DTH orders. Customer Care Specialists should not ask a customer if they would like to “shop four”.
Order Type Change	Enter a change of order type in this area. Some special ordering programs require a different order type.
Order Cancel Date	A date will appear showing the length of time titles will remain on backorder for the account. A customer may request for a different date to be entered.
Split	The customer may choose to turn off the split line option by entering N.
Special Project CD	Field used by IBC, Spring Arbor, College Market customers and Publishers. This code offers an additional percentage of discount and/or special payment terms. If an invalid special project code is entered, a specific error message is displayed.

What are the three items located on the order validation screen that must be discussed with the customer?

- **Backorder**
- **DC Pairs**
- **Purchase Order number**

Order Validation/Order Entry



OE01 Order Validation Screen

The order detail screen is where the customer's order is placed. The status given is current the moment an item ID, ISBN, or title is entered.

The title, return status and subject category are left justified beneath the order quantity. Status, list price, discount, author, pub number and pub date appear to the right. The lines entered appear at the bottom of the screen.

Please note function keys are located at the bottom of this screen and are available to assist in meeting the customer's needs.

- F2 **Annotation**
- F3 **Go to order recap screen**
- F4 **Screen Lock**
- F5 **Order Verification Screen**
- PREFIX **EAN Prefix lock**
- PO Number Change **Tab to PO field**
- @ **Author search**
- = **Keyword**

- > **Keyword with more than eight characters**
- T **IT30**
- X **Cancel title from order**
- I **Imprint or Index a title**
- U **Update a title**
- R **Review a line, making no changes**
- F10 **DC Swap**

The title status indicators are located to the right on the item entry line. The status codes are:

BACKORDER - PRIMARY	Title backordered in the primary
BACKORDER -SECONDARY	Title backordered in the secondary
COMPLETE - PRIMARY	Title filled completely from primary
COMPLETE - SECONDARY	Title filled completely from secondary
COMPLETE - SPLIT	Title filled completely from both primary/secondary
OUT - NOT BACKORDER	Title out, not b/o by customer
PARTIAL - PRIMARY, NOT BO	Partial quantity filled from primary, no backorder
PARTIAL - SECONDARY, BO PRIM	Partial fill from secondary, b/o in the primary
PARTIAL - SECONDARY, BO SECOND	Partial fill from secondary, b/o in the secondary
PARTIAL - SECONDARY, NOT BO	Partial fill from secondary, no b/o

PARTIAL - SPLIT, BO PRIMARY	Partial fill, split line, remainder b/o in the primary
PARTIAL - SPLIT, BO SECONDARY	Partial fill, split line, remainder b/o in the secondary
PARTIAL - SPLIT, NOT BO	Partial fill, split line, no backorder
PARTIAL PRIMARY, BO PRIMARY	Partial fill from the primary, backorder from primary
PARTIAL PRIMARY, BO SECONDARY	Partial fill from the primary, backorder from secondary

Shopping Sequence Change

A specialist may swap the shopping sequence (formerly “warehouse swap”) by **pressing F10** at any time during the order. The DC assignment will change in the Order Validation screen making the secondary the first shop and the primary the second shop.

```

SHIPTO: 20C9513 / 000485022 UCSD                PH: (858)534-0117
BILLTO: 2018566 / 000036617                    CONTACT:MARIANNE
CUST TYPE: E HIGHER EDUCATION-REGULAR          DIV: IBC / BK
WHSE: N-LAVERGNE /E-ROSEBURG                 ORD TP: TN
TOC: HE001 FFE 15/15                            EO
  
```

Before DC Swap NV/EE

```

SHIPTO: 20C9513 / 000485022 UCSD                PH: (858)534-0117
BILLTO: 2018566 / 000036617                    CONTACT:MARIANNE
CUST TYPE: E HIGHER EDUCATION-REGULAR          DIV: IBC / BK
WHSE: E-ROSEBURG /N-LAVERGNE                 ORD TP: TN
TOC: HE001 FFE 15/15                            EO
  
```

After DC Swap EE/NV

By pressing F10, the order will revert to the default DC pairing.

Shopping a Specific Distribution Center

A title may be shopped to an alternate distribution center by entering the single character warehouse code in the "W" field.

```
PRIM PO: 2010-04-13-09.58          SCDY PO: 2010-04-13-09.58
ORD  EAN/UPC/ISBN  B CAN DATE  W  PREFIX:
1___ 9781439189030_ N 06/12/2010 C COMPLETE - PRIMARY
TIME TO BETRAY          AUTH: KAHLILI REZA      PUBN: 0661
RETURNABLE             LIST: 26.00          DISC: REG
```

Line Item Detail

The warehouse from which we filled the title will be displayed in the bottom portion of the screen.

```
ORD  IN W EAN          B D CANC.DATE  TITLE          STA
_   1  1 C 9781439189030 N R 06/12/2010 TIME TO BETRAY  IN
```

Updating a Line

On occasion, you may need to make changes to a title ordered, verify split line quantity, etc. To do this a specialist enters the Line Item Change Screen. **To update a title, tab beside the title on the order validation screen, type “U” and press enter.**

```
OE07  TIME 12:48:59          LINE ITEM DETAIL          DATE 03/15/18

SHIPTO: 2089560 / 000452971 WORLD OUTREACH CHURCH      PH: (615)896-4515
BILLTO: 2089560 / 000452970                          CONTACT:R
CUST TYPE: FH CHURCH                                  ZIP: 37128 DIV: SA / SA
WHSE: N-LAVERGNE /D-FT WAYNE                          ORD TP: TN
TOC: 26003 FFE 15/15 TIER1 STICKERS EO

      EAN: 9780595450008      TITLE: 3
ITEM ID: 003396315          LIST: 12.95
ORD: 1 AVAL: 1 BO: 0
ORD B W AVAL CANC.DT PD PRTY
  1 Y N 1 05/14/2018 2018-03-15-12.48

DISC/PRICE LOCK
LIST PRICE: _____ DISCOUNT: _____

ENTER=Update  F3/CLEAR=End
```

Any field listed in **green** may be changed. The following fields may be updated

- Quantity Ordered
- Backorder Cancel Date
- Purchase Order
- Priority designation (primarily for IPS)
- Warehouse (title will show BO if out in original DC and but IN for new DC)

Once the fields are updated, pressing enter validates the changes. F3 returns the user to order entry. To cancel a title from the order, enter X beside the line item and press enter.

To backorder a title that the customer originally did not wish to backorder, a new line must be entered.

If the title is not on the order validation screen, press F5 to view a list of titles ordered.

NOTES:

Duplicate Check



```
POSSIBLE DUPLICATE ORDER! TOC:Y7XJV DATE:2010-03-08
F3/CLR=END PF2=ANNOT PF4=QTY LCK PF5=VER.ORD PF9:CUST.INFO PF11=TITLE-IT36
```

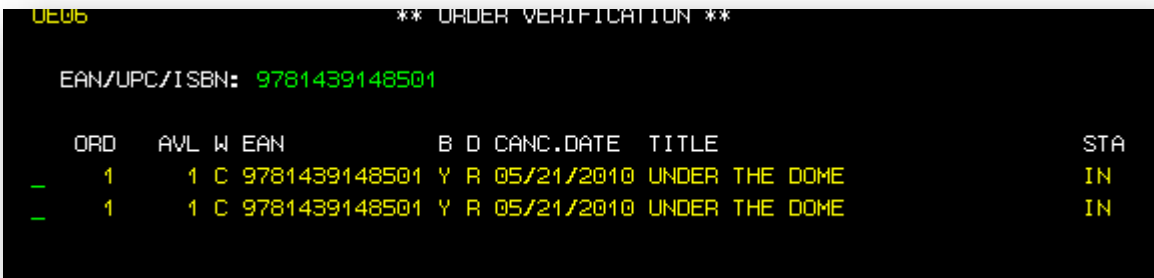
Duplicate Check Warning

If an order is entered that is an exact match to an order previously entered on the account (the method of entry isn't important), a message will appear at the bottom of the screen indicating a possible duplicate order and will reference the TOC and date of order entry.

The PO must be an exact duplicate. For example, 03/10/2010 isn't the same as 03-10-2010. PO Test 123 isn't the same as POTest123. Spacing, punctuation, etc. must match for the duplicate check function to work properly.

Duplicate Title Check within an Order

To verify a title hasn't been entered multiple times within an order, press F5 from the Order Validation screen. The specialist may either press F2 to display all duplicate lines or input the EAN/ISBN/Item ID in the search field or press enter. The duplicated lines will be displayed. If multiple pages of duplicates are returned, the information may be scrolled through by pressing F8.



```
UE06 ** ORDER VERIFICATION **
EAN/UPC/ISBN: 9781439148501
ORD  AVL W EAN          B D CANC.DATE  TITLE          STA
_   1   1 C 9781439148501  Y R 05/21/2010 UNDER THE DOME  IN
_   1   1 C 9781439148501  Y R 05/21/2010 UNDER THE DOME  IN
```

Order Recap

To navigate from Order Entry to the recap screen, press F3 (Clear/End).

Pro client - MainframeITS

OE05 TIME 16:33:29 ORDER RECAP DATE 03/22/10

SHIPTO: 20G2278 / 000601215 READMORE BOOK STORE PH: (508)822-3074
BILLTO: 20G2278 / 000601214 CONTACT:MARIANNE
CUST TYPE: C INDEPENDENT DIV: IBC / BK
WHSE: C-CHAMBERSBURG /N-LAVERGNE ORD TP: TN
TOC: HE002 FFE 15/15 EO

PRIM PO: 2010-03-22-16.13 SCDY PO: 2010-03-22-16.13

DC	IN	BO	TOTAL	EXT VAL	WEIGHT
CI	6	1	7	167.94	10.62
NV	4	2	6	109.84	3.09

TOTAL 10 3 13 277.78 13.71 ATTEMPTED 13

SHIPPING OVERRIDES

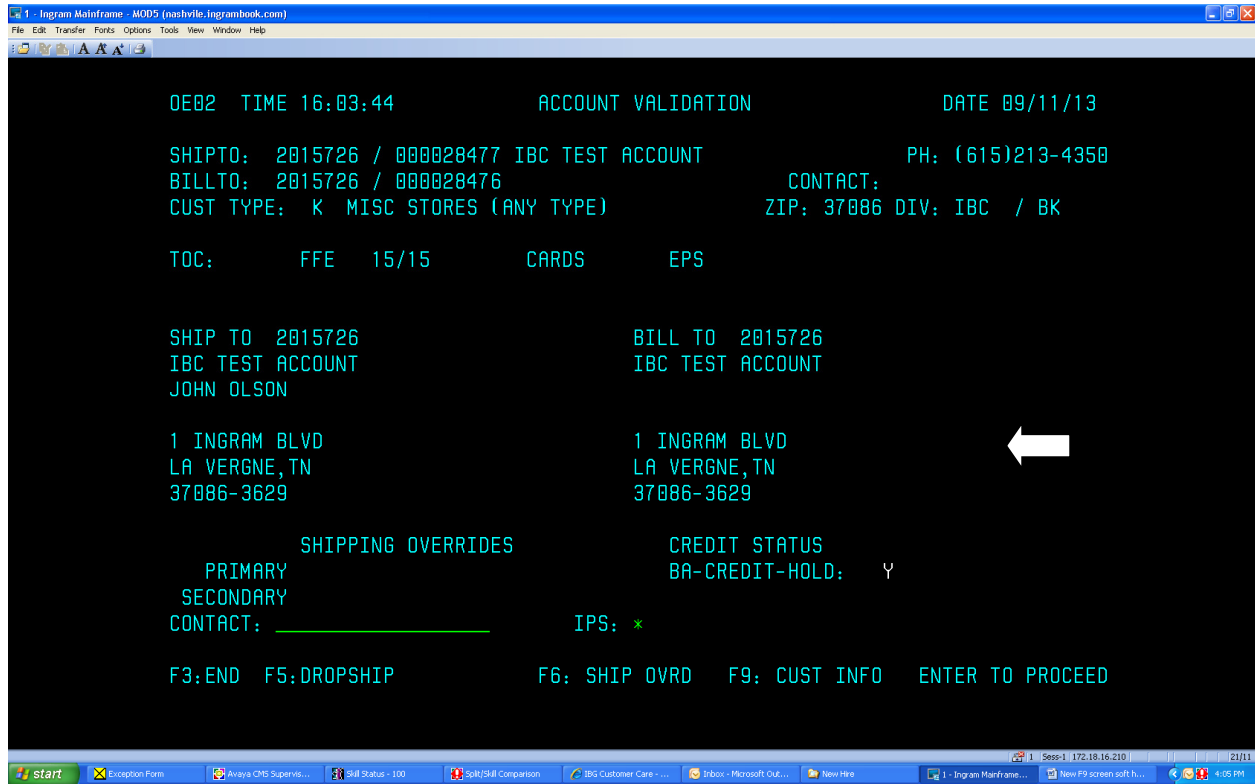
PRIMARY:
SECONDARY:
SPEC.PROJ:
ONE AMOUNT: ATTN:
Type:END/CAN F1=Cont Ord F5=Ver.Ord F6=Elec Cnfm F9=Cust Info F10=Pricing

Ready OVR NUM 24,2

- The breakdown by warehouse is broken down by in stock or backordered and the extended retail value. The total weight of the product is broken out by warehouse as well. Total attempts display in the lower right above shipping overrides.
- Shipping **may not** be overridden at the end of the order.
- Special project codes may be added at the end of the order.
- Discount and pricing is available by pressing F10.
- A confirmation may be sent by pressing F6
- A specialist may return to order validation by pressing F1
- An order must be complete (**END** entered) before the specialist can make any changes to the order in OEBP. Not ending the order and making changes in OEBP while it is still open will result in the order going into a suspended status.

The order is processed by typing END (or CAN to cancel) and pressing enter.

Soft Credit Hold



From the first page of OE01, we can now see if the customer is on a Soft Hold in Credit. If the customer requests expedited shipping, we should **never** make a guarantee.

Use the following script to explain shipping details.

"I will be happy to request expedited shipping for this order. The order should deliver on time barring any unforeseen circumstances such as weather delays, transportation issues and/or credit exceptions".

```
1 - Ingram Mainframe: MOD5 (nashville.ingramhook.com)
File Edit Transfer Fonts Options Tools View Window Help
OM17 TIME 16:04:54 SELECT SHIPPING OPTIONS 09/11/13
SHIPTO 2015726 IBC TEST ACCOUNT
*****CREDIT STATUS: SOFT HOLD*****
-- WHSE CURRENT PL TO: _____
-- WHSE CURRENT PL TO: _____
  USE ST: Y
  1 BOOK POST
  * 2 NEXT DAY AIR
  3 OPENING STORE CAT
  4 PARCEL POST
  5 PL TO
  6 PRIORITY MAIL
  7 UPS
  8 WILL PICKUP
  * 9 2ND DAY AIR
  10 3 DAY SELECT

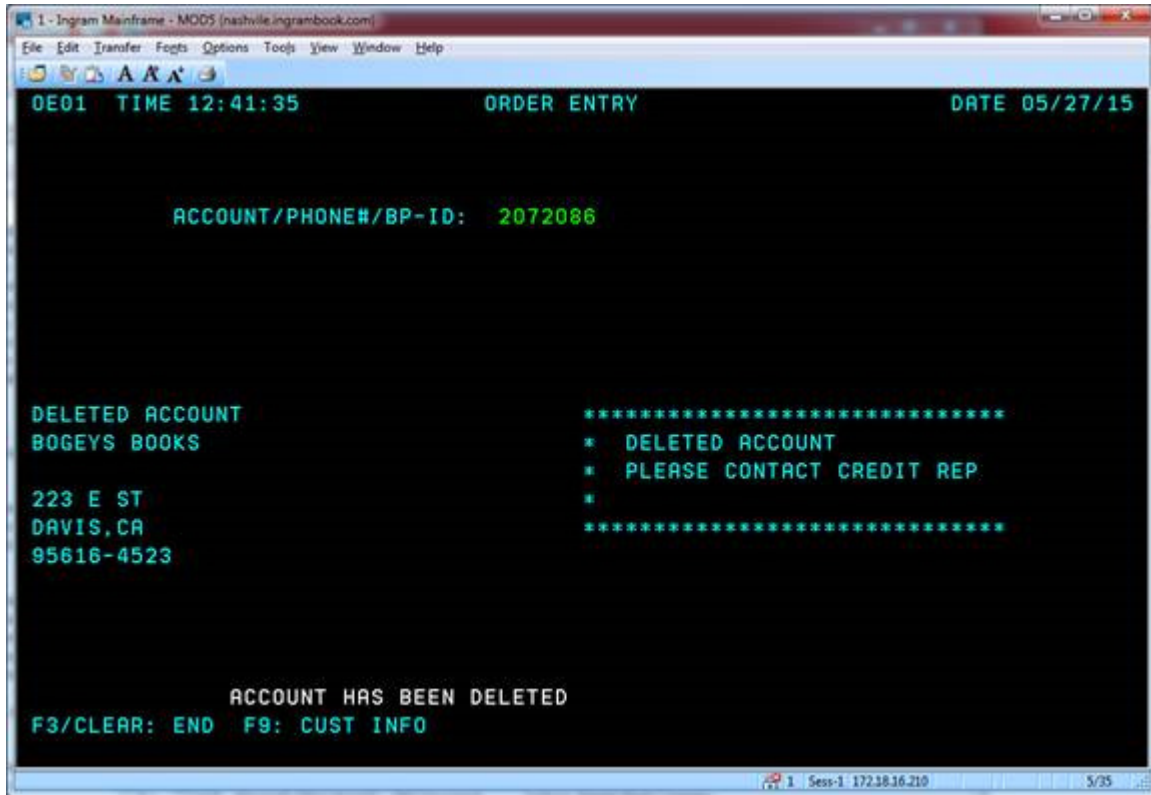
  95 UPS CODE 25          96 UPS NEXT CODE 25
  97 UPS 2ND CODE 25     98 UPS SAT DEL CODE 25
  99 NO OVERRIDE
MESSAGE AREA: *INDICATES VALID ONESRCE SHIPPING OVERRIDES PF3 TO RETURN
```

If the customer questions the credit exceptions, use the following script.

*“I apologize but unfortunately Customer Care is not provided credit details. Would you like to be transferred to a **Credit Manager** for further assistance?”*

Please find the Credit rep via OE01 and find the associated Credit Manager via the People Search in iKnow. If the designated Credit Rep is not available, you may offer to transfer to their voicemail or to call the Credit Rotary (Credit Rotary is listed on iKnow Yellow Pages)

Deleted Accounts



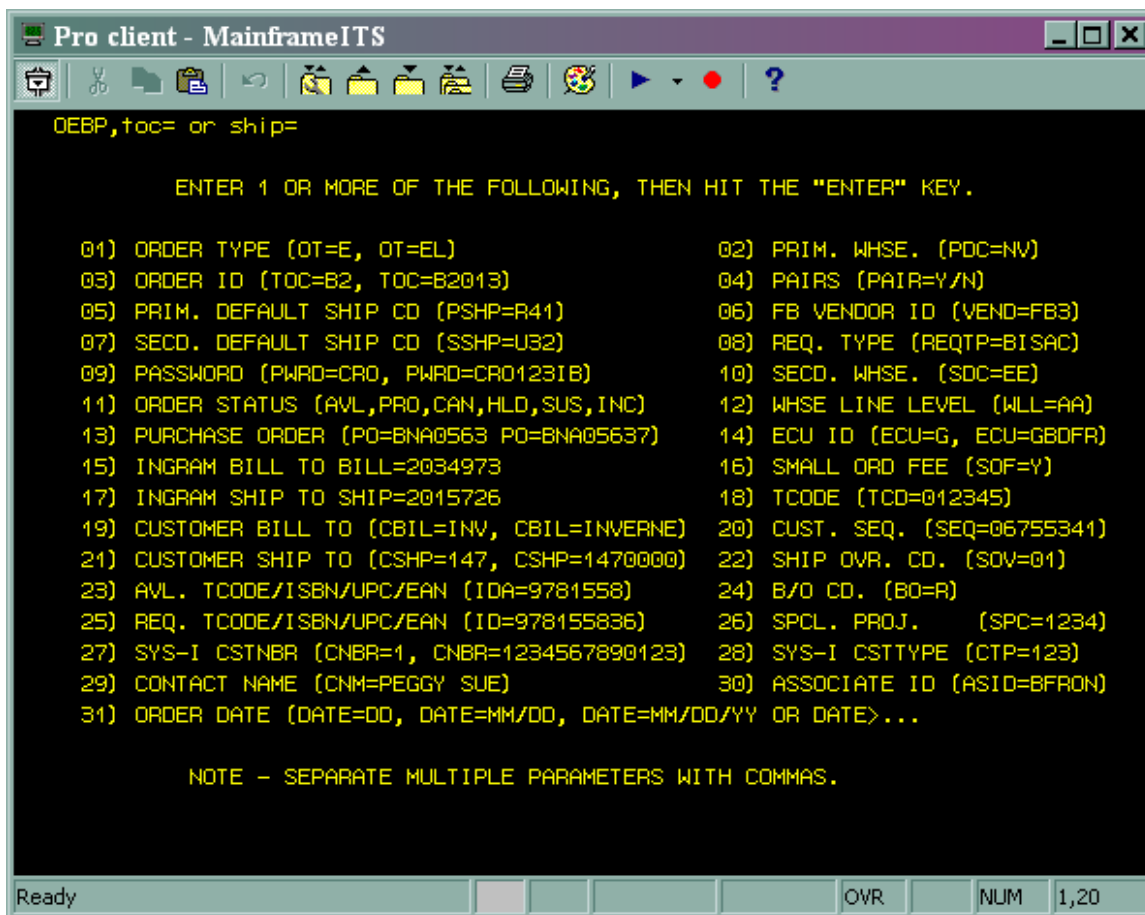
Customer calls in to place an order (see screen shot above). What would your response be to the customer? **Re-verify that you have the correct account then say,** " Unfortunately that account is no longer valid. You can begin the application for a new account at getstarted.ingramcontent.com or I can transfer you to our New Accounts department"

OEBP-Today's Order Status Screen

OEBP is the function we use to determine if an order that has been placed today is still available or if it has already been processed. Usually, the reason we want to know this is because a customer wants to add to an order that has already been completed. For instance, a customer calls and places an order with us. About twenty minutes later the calls back, and wants to add to the order. If the order is available (AVL) in the system, then any order that he places now will combine with the first for shipping, discount, etc. (as long as the order type allows it.) Customers may place orders for any amount.

Before placing an additional order for a customer, we must determine whether the order he placed twenty minutes ago is still available in the system.

To access OEBP, open a new Mainframe window. Type OEBP and press enter.



```
Pro client - MainframeITS
OEBP,toc= or ship=

ENTER 1 OR MORE OF THE FOLLOWING, THEN HIT THE "ENTER" KEY.

01) ORDER TYPE (OT=E, OT=EL)          02) PRIM. WHSE. (PDC=NV)
03) ORDER ID (TOC=B2, TOC=B2013)      04) PAIRS (PAIR=Y/N)
05) PRIM. DEFAULT SHIP CD (PSHP=R41)  06) FB VENDOR ID (VEND=FB3)
07) SECD. DEFAULT SHIP CD (SSHP=U32)  08) REQ. TYPE (REQTP=BISAC)
09) PASSWORD (PWRD=CRO, PWRD=CRO1231B) 10) SECD. WHSE. (SDC=EE)
11) ORDER STATUS (AVL,PRO,CAN,HLD,SUS,INC) 12) WHSE LINE LEVEL (WLL=AA)
13) PURCHASE ORDER (PO=BNA0563 PO=BNA05637) 14) ECU ID (ECU=G, ECU=GBDFR)
15) INGRAM BILL TO BILL=2034973      16) SMALL ORD FEE (SOF=Y)
17) INGRAM SHIP TO SHIP=2015726     18) TCODE (TCO=012345)
19) CUSTOMER BILL TO (CBIL=INV, CBIL=INVERNE) 20) CUST. SEQ. (SEQ=06755341)
21) CUSTOMER SHIP TO (CSHP=147, CSHP=1470000) 22) SHIP OVR. CD. (SOV=01)
23) AVL. TCODE/ISBN/UPC/EAN (IDA=9781558) 24) B/O CD. (BO=R)
25) REQ. TCODE/ISBN/UPC/EAN (ID=978155836) 26) SPCL. PROJ. (SPC=1234)
27) SYS-I CSTNBR (CNBR=1, CNBR=1234567890123) 28) SYS-I CSTTYPE (CTP=123)
29) CONTACT NAME (CNM=PEGGY SUE)      30) ASSOCIATE ID (ASID=BFRON)
31) ORDER DATE (DATE=DD, DATE=MM/DD, DATE=MM/DD/YY OR DATE>...

NOTE - SEPARATE MULTIPLE PARAMETERS WITH COMMAS.

Ready OVR NUM 1,20
```

First OEBP Screen

This will activate the first OEBP screen. Listed on the screen are the parameters you can use to make your search.

What are the two main ways we use to find a customer's order on OEBP?

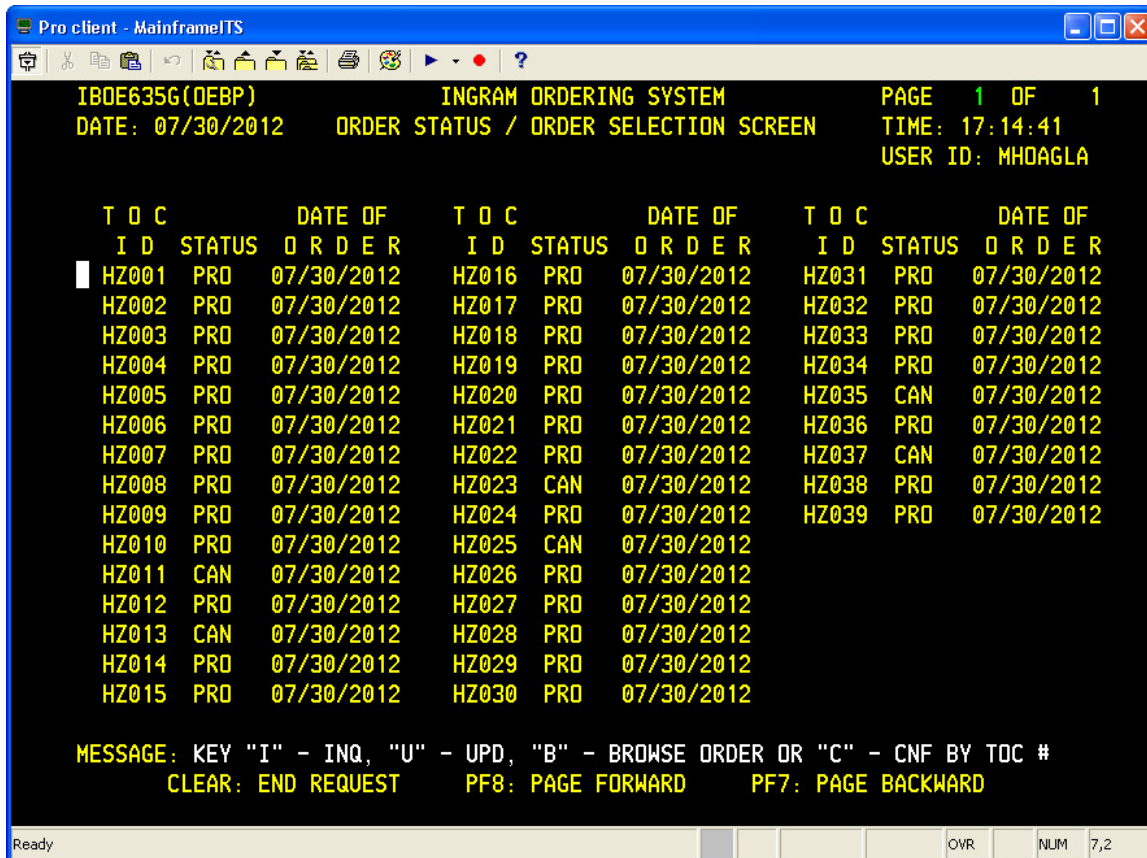
- ✓ **Account number**
- ✓ **TOC**

Note: You may review orders in OEBP for up to 2 weeks by entering either toc= or ship=, date=

You can search using multiple parameters by separating your inputs with commas

i.e. **TOC=xxxxx,Date=mm/dd**

Once the computer has completed the search, a list of orders that matches the search parameters will appear.



The five statuses that you might see on the OEBP screen are:

- ✓ **AVL** – Order is available and can be updated or combined with other orders
- ✓ **PRO** – The has been processed. No changes can be made
- ✓ **SUS** – The order is suspended, but a warehouse sweep will still pick it up
- ✓ **HLD** – The order has been held, we may update it to be AVL
- ✓ **CAN** – The order has been cancelled

Usually, all you need to know is if the customer's order is available. Sometimes, however, the customer will need more specific information about their order. If you type an "I" in the small field to the left of the TOC (Terminal Operator Code) number, it will show you the order in detail.

If a customer wishes to add to an order, the steps to take are:

1. **Check OEBP to see if the order is still AVL (available). If so,**
2. **Begin a new order in OE01**
3. **Use the same shipping instructions, DC, and PO**
4. **Key in the order and proceed to the end of the order without ENDing it**
5. **Go back to OEBP, clear your screen, and re-query the original order**
6. **If the original order is still available, then END the additional order. If the original order has processed, then ask how the customer how they want to proceed**

If you will be creating another to combine with an available order, you must clear out of your search, and re-key your search immediately before sending the new order through. This will refresh OEBP, and it will tell you if the order is actually still available. If the order status has changed to Processed (PRO), then the new order will NOT combine with it.

Viewing Orders in OEBP

To view the contents of an order in OEBP, you may type **I** to Inquire about it, or type **B** to browse it. The Browse screen is listed below:

```

Account and Order Info
=====
IBOE506G(OEDD)          INGRAM ORDERING SYSTEM          PAGE 000001 OF 000002
DATE: 03/07/2018        ORDER INQUIRY / UPDATE SCREEN    TIME: 09:52:47
ORDER - NUMBER: Y2WIC   START TIME: 00.15.26  END TIME: 00.15.26  STATUS: PRO
SHIPTO: 20T1451        NAME: COW LICK BOOKSHOP - B4070  ORDER TYPE: EO
BILLTO: 20M4619        WAREHOUSE: N            BACKORDER CODE: Y   B/O REL FLAG: R
PO-P: Mandy            PRIM. SHIP INSTR: USE PKMS SHIPPING OPTIONS
PO-S:                  SEC"D. SHIP INSTR:
CANCEL DATE: 01/01/0001 SPC:      SS DATE: 01/01/0001  STATUS: ___  IPAGE
IPS=N =====
LINE W -ITEM ID- DRD----- REQD ITEM----- TITLE----- II
NUMBR H  B/O      SHP---  B/O CAN DT  PO----- PRICE---
  1 N 004786300    3 1883360269  COURSE IN MIRACLES COMBINED-3E NN
      Y              3 06/05/2018  Mandy 23.00
  2 N 000058708    1 0553572628  DAYS OF AIR & DARKNESS NN
      Y              0 06/05/2018  Mandy 7.99
  3 N 000276166    1 0553290126  DAYS OF BLOOD & FIRE NN
      Y              0 06/05/2018  Mandy 7.99
  4 N 039837904    1 0062684450  DONT SKIP OUT ON ME NN
      Y              0 06/05/2018  Mandy 22.99
  5 N 039674926    1 1328473058  MAN WHO CLIMBS TREES NN
      Y              0 06/05/2018  Mandy 26.00

MESSAGE:
PAUSE:END PF3:RESET PF6:SHIPINSTR PF7:BACK PF8:FWD PF9:DROPSHIP IND/IMP:I
  
```

The top portion of the screen (outlined in red) displays the account info and the order settings

This bottom part of the screen (outlined in green) displays the order information on a line by line basis. The customer may wish to know whether a specific title was ordered in the order they placed earlier, whether it was in stock or backordered, or how many of a given title were ordered.

You can tell if a title was in stock by **the number shipped**. Also, titles that are shipping are listed in white font (titles on BO are in blue font)

Making Changes in OEBP

If an order is still **available** (AVL) there are changes that can be made at a customer's request. To make updates, place a **U** in the green line to the left of the TOC number

```
IBOE635G(OEBP)          INGRAM ORDERING SYSTEM          PAGE 21 OF 21
DATE: 03/07/2018      ORDER STATUS / ORDER SELECTION SCREEN  TIME: 10:01:36
                                                                USER ID: JSHANK

      T O C          DATE OF          T O C          DATE OF          T O C          DATE OF
      I D STATUS    O R D E R      I D STATUS    O R D E R      I D STATUS    O R D E R
  _ Y2W6Q  AVL    03/07/2018  _ Y2W65  AVL    03/07/2018
  _ Y2W6R  AVL    03/07/2018  _ Y2W66  AVL    03/07/2018
  _ Y2W6S  AVL    03/07/2018  _ Y2W67  AVL    03/07/2018
  _ Y2W6T  AVL    03/07/2018
  u Y2W6U  AVL    03/07/2018
  _ Y2W6V  AVL    03/07/2018
  _ Y2W6W  AVL    03/07/2018
  _ Y2W6X  AVL    03/07/2018
  _ Y2W6Y  AVL    03/07/2018
  _ Y2W6Z  AVL    03/07/2018
  _ Y2W60  AVL    03/07/2018
  _ Y2W61  AVL    03/07/2018
  _ Y2W62  AVL    03/07/2018
  _ Y2W63  AVL    03/07/2018
  _ Y2W64  AVL    03/07/2018

MESSAGE: FINISHED VIEWING/EDITING TOC:
          CLEAR: END REQUEST      PF8: PAGE FORWARD      PF7: PAGE BACKWARD
```

The following changes can be made (anything listed in GREEN can be updated):

- ✓ **Delete title(s)** – by changing the quantity to 0
- ✓ **Decrease quantity(s)** – by typing the new quantity over the original quantity
- ✓ **Edit PO#** - type over it to change it
- ✓ **Edit B/O cancellation date** - type over it to change it
- ✓ **Edit B/O release flag** - type over it to change it
- ✓ **Cancel order** - Type **CAN** in the STATUS field

Press **Enter** to submit the changes, then press **Pause/Break** to get out of the screen

(NOTE: do not press F3 unless you need to re-set the changes you've made)

```

IBOE506G(OEDD)          INGRAM ORDERING SYSTEM          PAGE 000001 OF 000005
DATE: 03/07/2018        ORDER INQUIRY / UPDATE SCREEN    TIME: 10:01:17
ORDER - NUMBER: Y2W6U   START TIME: 09.58.19  END TIME: 09.58.19  STATUS: AVL
SHIP TO: 20U1682       NAME: INSPIRATIONS                ORDER TYPE: ED
BILL TO: 20U1681      WAREHOUSE: D/N                BACKORDER CODE: Y   B/O REL FLAG: H
PO-P: 3718             PRIM. SHIP INSTR: USE PKMS SHIPPING OPTIONS
PO-S: 3718             SEC"D. SHIP INSTR: USE PKMS SHIPPING OPTIONS
CANCEL DATE: 01/01/0001 SPC:          SS DATE: 01/01/0001  STATUS: ___  IPAGE
IPS=N =====
LINE W -ITEM ID-  ORD----- REQD ITEM----- TITLE----- II
NUMBR H  B/O      SHP---  B/O CAN DT  PO----- PRICE---
  1 D 031436237      2 0794438490  BABYS 1ST BIBLE SPECIAL/E-BOAR NN
      Y              2 05/06/2018  3718              9.99
  2 D 031436456      1 0794438350  BABYS 1ST BIBLE SPECIAL/E      NN
      Y              1 05/06/2018  3718             14.99
  3 D 038710508      1 133811090X  BEECAUSE I LOVE YOU-BOARD      NN
      Y              1 05/06/2018  3718              7.99
  4 D 000830791      3 9900493397  BIBLE TAB-PROTESTANT-SLV & BLK NN
      Y              3 05/06/2018  3718              4.75
  5 D 000940956      1 0842332847  B-NL-TYN                        NN
      Y              1 05/06/2018  3718             14.99

MESSAGE:
PAUSE:END  PF3:RESET  PF6:SHIPINSTR  PF7:BACK  PF8:FWD  PF9:DROPSHIP  IND/IMP:I
  
```

Format for searching in OEBP

OEBP,ship=xxxxxxx This searches for all of the orders this ship-to account has placed TODAY. In order to view all of the orders a ship-to account has placed on a previous date, you would use the following query: **OEBP,ship=XXXXXXXX,date=xx/xx** (NOTE: OEBP only holds order information for 2 weeks. Also, the order will become viewable in OM60 once it has hit the P/L or once a status is assigned)

OEBP,TOC=xx or OEBP,TOC=xxxxx This query searches for order via their TOC. If no date is put in, then the system will search ONLY for today's orders

OEBP,date=xx/xx This searches for orders from a specific date and should most effectively be used in conjunction with another query such as an account number

Order Inquiries (OM60)

Target Points

- ✓ Purpose of OM60
- ✓ Questioning skills for OM60 inquiries
- ✓ Identifying backorders, committed backorders, and pending backorders
- ✓ Recognizing shipped and invoiced titles
- ✓ Customer information found on OM60
- ✓ Cancel a backorder and/or committed backorder



Purpose of OM60:

To check the status of product on backorder or a committed backorder, and to check previous titles ordered.

OM60 Screen



Seaching for orders and ISBNs in OM60

Enter at least 1 item from this section in order to begin a query

```

OM01 TIME 09:15:18 OPEN/CLOSED ORDER INQUIRY AND CHANGE DATE 03/07/18
***** SELECT REQUIREMENTS (ACCOUNT OR OE OR ITEM REQUIRED) *****
BILLTO,SHIPTO,TELE: _____ ITM/UPC/EAN: _____ OE/INVC: _____
BILLTO REQ: _____ TOTALS ONLY: _____
          
```

Select what you want to search by entering Y or N on each line

```

***** STATUS REQUIREMENTS (MAY ENTER ANY OF THE FOLLOWING) *****
STATUS: BACKORD: Y ON P/L: Y COMMITTED: Y PENDING: Y NOT B/O: N
SLASH/CAN/MOVES: Y INVOICED: Y EXTRACT: Y SHIPLOG: N
          
```

This information is optional, but the more info you enter, the more focused your search results will be

```

***** SELECT OPTIONS (MAY ENTER ANY OF THE FOLLOWING) *****
---WAREHOUSES _____
---STARTING TITLE _____
---PO NUMBER _____
---ORDER TYPE _____
---TOC: ALL / PREFIX: 1 OR 2 _____
---RUN NUMBER _____
---ORD QTY MIN: _____ MAX: _____
---CUST ORIG PO _____
---IPS ONLY: _____ IBC ONLY: _____
---AUTHOR FROM: _____ TO _____
---PUB NUMBER: _____
---ORD DT: FROM _____ TO _____
---CAN DT: FROM _____ TO _____
---P/L DT: FROM _____ TO _____
** ABOVE DATES ARE MMDDYY FORMAT **
---DEPT INCL _____
---DEPT EXCL _____
---CST RTL PO _____
---PRIORITY: FROM _____ TO _____
---DISCOUNT: FROM _____ TO _____
---PTO: _____
-----
REASON: _____ (REQUIRED FOR CANCELS)
MESSAGE AREA:
F3: CLEAR: END F4: RESET F5: SORT OPTION F6: CHG ALL
F10: PENDING MNT F11: MNT HIST F12: SQL
          
```

To begin a search for previous order info in OM60:

- Enter at least 1 item from the top section (outlined in red in the screenshot above) to begin a query
- Select what you want to search by entering Y or N on each line (in the section outline in yellow)
- Information in the area outlined in blue is optional, but the more info you enter, the more focused your search results will be

F4 will clear out the screen for a new search. Be sure to remember to check what you have Y or N flagged in the Status line so that you can search accurately.

After all this data is keyed, press enter to begin the inquiry. The results will be shown on a screen that looks like this:

```

OM02 TIME 09:05:21 OPEN/CLOSED ORDER INQUIRY 03/08/18 PAGE 1.15
SHIPTO:20B9560 BILLTO:20B9560 WORLD OUTREACH CHURCH DIV:SA DC:NV/DD
SEL VALUE:020118, SHORTNAME MURFRTN
  
```

W/OE/RUN	-----TITLE-----	TOC	ORD	SHP	B/O	ORD	DATE	CAN	DATE		
ITEM-ID	PO	PRICE	DS	D	F/F	SPC	I	CBO	DATE	STATUS	
IPS	OT	EAN	PUBA	PUBN	LN#	AUTHOR	Z/M/P/R/F	ST.	DATE	INV.	DATE
- N7QFF3227	THEN & NOW BIBLE MAPS INSERT	Y1K8A	002	002	000	02-08-18	33102057				
004089097	20180208N	16.99	430	Q	F	02-08-18	INVOICED				
EO	9781596362932 ROSI D972 0012 ROSE PUB				H		02-09-18				
- D6XB5K746	TYG	Y13NZ	001	001	000	02-19-18	33238383				
001678206	20180219D	6.99	430	R	F	02-19-18	INVOICED				
EO	9780842353717 TYND 0815 0009 BOSTROM				H		02-19-18				
- N7QFF3227	UNSPOKEN	Y1K8A	001	001	000	02-08-18	33102057				
039518589	20180208N	14.99	430	Q	F	02-08-18	INVOICED				
EO	9780736972994 HARH 0398 0014 HUNT JOH				H		02-09-18				
- D60Q98784	VEGT SUPER SILLY ACTIVITY BK	Y2H42	002	002	000	02-27-18	33400913				
020693468	20180227D	4.99	430	Q	F	02-27-18	INVOICED				
EO	9780824956721 IDWY F005 0005 RUMBAUGH				H		02-28-18				
- N8SDX2457	VICTORY OVER THE DARKNESS 2/E	Y2S01	004	004	000	03-05-18	33498937				
020643674	20180305N	14.99	430	Q	F	03-05-18	INVOICED				
EO	9780764213762 BETE 0109 0009 ANDERSON				H		03-06-18				

```

MESSAGE AREA:
I:CUST ITEM D:DROPSHIP T:TITLE (IT30) O:ORD SUMMARY H:HIST B:BROWSE S:00
X:DEL U:UPDATE R+F1:REORDER F3:END F7:BACK F8:FWD F9:CUST INFO F12:SQ
  
```

- The area outlined in yellow is the 3-line key that will help you to interpret the contents of the order
- The area outlined in blue shows each item ordered (presented in 3-line format)
- The area outlined in red are the options for inquiring about a line. To inquire on a line, type one of the following letters into the small red line to the left of the entry
 - I – Shows indexing/imprinting info (IPS will not be using this)
 - D – Show Drop Ship address and information if drop shipping was used
 - T – Brings up an abridged stock check page
 - O – Shows an order summary for the total order
 - H – Displays history including any unusual delays (i.e. credit holds). A tracking number (if available) will also be displayed for 2 weeks under this option
 - B – Shows the contents of this order
 - X – Will delete an item (can only be used if the item is not yet on the Pick List)
 - U – Brings up a screen to update a line (can only be used if the item is not yet on the Pick List)

- R+F1 will allow you to place a re-order of the item and include the original discount
- F7 – Displays the previous page
- F8 – Displays the next page
- F9 – Customer info

Line items (area outlined in blue in the screenshot on the previous page) contain 3 lines each. Starting at the first line, and reading from left to right in yellow outlined section above, here’s what each of the fields mean:

W	Warehouse product is shipping from
OE	Order Entry Number (five characters)
RUN	Run Number
TITLE	Name of the product
TOC	Control number on which the order was placed
ORD	Quantity ordered
SHP	Quantity shipped
B/O	Quantity placed on backorder
ORD DATE	Date the order was placed
CAN DATE	The assigned backorder cancel date, date the backorder was cancelled. After the order invoices, this field contains the invoice number.

The second line contains:

Item ID	Also known as title code
PO	Indicates the Purchase Order Number given by the customer at the beginning of an order.
Price	The retail price of the book
DS	Discount applied based on units attempted in the order
D	Department or Product Code
F/F	Free Freight Codes (see Intranet for explanation of codes)
SPC	Special Project Code is a discount code
I	Imprint/Index –if a customer requested for a Bible to be imprinted or indexed, you will see a “Y” in this field.

CBO Date	Committed Backorder Date-refers to the date that order was committed to a picking list
STATUS	** Refers to #1 or #2 below **

1. The Status can be B/O, Committed, and Pending, on P/L, Not B/O, SLSH/CAN/MOVES, and Invoiced.
2. If the titles have been invoiced, this field is for the Date Invoiced. **The actual date of the shipping can be confirmed through calling Customer Service.**

60P*CAN	Indicates that a backorder cancelled and will appear on p/l.
60L*CAN	This can mean 1 of 2 reasons: 1.The title has cancelled because the backorder cancellation date has passed. The customer is notified by letter if they have requested to receive notification via mail. 2.The credit department or warehouse has cancelled the order.
LINE CAN	The customer or Credit Department has requested for the committed backorder(s)to be cancelled.
ORD MOVE	Indicates the move of a backorder from one warehouse to a different warehouse. There are 2 different automatic processes that can do this. Both are based on stock availability.
AUTOSLSH	This is a line that is canceling because the line was autoslashed in the warehouse.
SLSH/CAN	This is a line that has either been cancelled OR slashed and then cancelled. Warehouse cancels, warehouse slashes and inventory prediction errors will all have this.

The third line has information regarding:

IPS	Indicates if the title was placed as an IPS order
OT	Order type
EAN	13 digit product identifier
PUBA	Publisher alpha four letter abbreviation
PUBN	Publisher number
L#	Line number of the title on the picking list
AUTHOR	Author of the title
Z	Basic stock flag
M	Indicates Street Smart Select title
P	Priority setting (IPS driven)

R	Indicates if a customer's backorders were set to hold and combine or release immediately
F	Future Ship status
St Date	Street date assigned for a title
Inv Date	Invoice date

A screenshot of the History (H) screen is below.

- Area outlined in yellow will tell you if the order released normally, had been held by credit, is waiting to release, etc
- The area outlined in red displays the Tracking number (NOTE: the tracking number will disappear after 2 weeks)

```

OE68  TIME 11:12:30          LINE ITEM HISTORY          DATE 03/15
DC: EE OE:84MWZ LINE:0024 ST/BT:2057694/2057694 TOC:J3UAC DATE:
TITLE ORDERED 2018-03-13@17.34.37 BY BIGBISAC          ORD:  2 P
      ON  1 LINES IN 1 DC          B/O:N   CANCEL DATE:09/09/2018
TITLE COMMITTED ON: 03/14/2018
DISC RSN: 710,IPS BASE DISCOUNT
FRT RULE:SHIPMENT MET QTY THRESHOLD
RELEASED BY BEING A NEW ORDER
NO CREDIT INFORMATION FOUND FOR THIS ORDER
POOLED 2018-03-14@05.06.37  ON P/L 2018-03-14@05.09.55  BILLED 2
      2 UNITS SHIP ON TRACK#:031484MWZ0534639 BOL#:E00201819
  
```

OM60 Status Inquiries:

We can focus our search by selecting what statuses we would like to see in our results by putting a **Y** in the statuses we wish to view, and putting an **N** in those we wish to exclude.

The following screenshot will bring up all items that are on Backorder and are Committed Backorders for Ship To Account 2057694

```

OM01 TIME 11:28:46 OPEN/CLOSED ORDER INQUIRY AND CHANGE DATE 03/15/18
***** SELECT REQUIREMENTS (ACCOUNT OR OE OR ITEM REQUIRED) *****
BILLTO,SHIPTO,TELE: 2057694 ITM/UPC/EAN: OE/INVC:
BILLTO REQ: TOTALS ONLY:
***** STATUS REQUIREMENTS (MAY ENTER ANY OF THE FOLLOWING) *****
STATUS: BACKORD: y ON P/L: N COMMITTED: y PENDING: N NOT B/O: N
SLASH/CAN/MOVES: N INVOICED: n EXTRACT: N SHIPLOG: n
  
```

The results will look like the following example:

```

OM02 TIME 12:19:29 OPEN/CLOSED ORDER INQUIRY 03/15/18 PAGE 1.01
SHIPTO:2057694 BILLTO:2057694 THIRD PLACE BOOKS DIV:IBC DC:EE/NV
SEL VALUE: SHORTNAME LAKE WA
W/OE/RUN -----TITLE----- TOC ORD SHP B/O ORD DATE CAN DATE
ITEM-ID PO PRICE DS D F/F SPC I CBO DATE STATUS
IPS OT EAN PUBA PUBN LN# AUTHOR Z/M/P/R/F ST.DATE INV.DATE
- E84ZF6900 BACKORDER RELEASE T/C ZT001 001 000 001 03-15-18 03-15-18
000122222 0400452 0.00 000 Z 03-15-18 NOT B/O
IPS TN 9785551222224 ISTP 8899 0001 INGRAM R
- E72Z2S900 ABT FACE YOEMP 001 000 001 01-16-18 01-16-19
040640087 4212219 16.00 460 Q F 01-17-18 B/O
IPS EO 9780802128065 GROV P163 0093 LEON DON H
- E80L54900 ADV OF TOM SAWYER YOEMP 001 000 001 01-16-18 01-16-19
041038205 4212219 17.99 460 Q F 01-17-18 B/O
IPS EO 9781947808027 UDON P966 0011 TWAIN MA H
- H9NG1F905 AFTER 1-HUNDRED-AND-20 Z-001 001 000 001 02-28-18 02-28-19
040847782 4212335 18.95 450 Q F 03-02-18 B/O
IPS TN 9780691181165 PRIN P078 0036 HALKIN H H
- H9MJP8905 AGAINST MEMOIR Y12L1 006 000 006 02-18-18 02-18-19
039502237 4212292 18.95 460 Q F 02-20-18 B/O
IPS EO 9781936932184 AMYE P531 0008 TEA MICH H
MESSAGE AREA:
I:CUST ITEM D:DROPSHIP T:TITLE (IT30) O:ORD SUMMARY H:HIST B:BROWSE S:00
X:DEL U:UPDATE R+F1:REORDER F3:END F7:BACK F8:FWD F9:CUST INFO F12:SQ
  
```

You can search for as many or as few statuses as you like by adding Y or N to each selection. The only field that will provide a different view than shown above is SHIPLOG. SHIPLOG will automatically override any other selections you have in this area, and only the SHIPLOG screen will be displayed.

SHIPLOG

To view what **carrier** was used to ship an order, use the following prompts:

- Enter the Ship To account number
- Enter the OE (Order Entry) number. **NOTE: The OE number MUST follow a 5-character format when searching in OM60.** We drop the letter that indicates the warehouse from the beginning, and we drop the 3-digit run. Using more than 5 characters in OM60 for this field will not work
 - i.e. **E84MWZ053** must be entered as **84MWZ** (the E indicates this order was ordered from the Roseburg warehouse)
- In the Status section, list a Y in **INVOICED** and in **SHIPLOG**

```

OM01 TIME 11:17:27 OPEN/CLOSED ORDER INQUIRY AND CHANGE DATE 03/15/18
***** SELECT REQUIREMENTS (ACCOUNT OR OE OR ITEM REQUIRED) *****
BILLTO, SHIPTO, TELE: 2057694 ITM/UPC/EAN: OE/INVC: 84MWZ
BILLTO REQ: TOTALS ONLY:
***** STATUS REQUIREMENTS (MAY ENTER ANY OF THE FOLLOWING) *****
STATUS: BACKORD: n ON P/L: n COMMITTED: n PENDING: n NOT B/O: n
SLASH/CAN/MOVES: n INVOICED: Y EXTRACT: n SHIPLOG: y
***** SELECT OPTIONS (MAY ENTER ANY OF THE FOLLOWING) *****
---WAREHOUSES
---STARTING TITLE ---ORD DT: FROM TO
---PO NUMBER ---CAN DT: FROM TO
---ORDER TYPE ---P/L DT: FROM TO
---TOC: ALL / PREFIX: 1 OR 2 ** ABOVE DATES ARE MMDDYY FORMAT **
  
```

When you hit Enter, the following result will appear:

```

OM16 TIME: 11.25.10 SHIPLOG DATE: 03/15/18 PAGE: 1
ACCOUNT: 2057694 BILLTO REQ: THIRD PLACE BOOKS BILLTO: 2057694
DC: OE: 84MWZ RUN: OT: INV DATE: TO (MMDDYY)
DC OE/RUN OT CARRIER INV DATE CTN WGHT AMOUNT SHIPTO
_ EE 84MWZ053 EO ID AUBURN 03-14-18 2 63.06 .00 2057694
  
```

The white text in the above screenshot (starting with **DC**) indicates the following (follow from left to right):

- DC - warehouse the order shipped from
- OE and Run number
- OT - order type
- Carrier (shipper)
- Invoice date
- CTN (how many cartons were in this shipment)
- Weight – total weight of all cartons
- Amount – the price the customer paid for freight
- SHIPTO – Ship TO account number

