**SCT AND PO AUTOMATION**

***Purpose:*** Currently, orders from retail stores are submitted thru eCat and processed manually in Syspro for placing Supply Chain Transfers (SCT) and Purchase Orders (PO). SCT and PO automation will alleviate retail management from manually processing orders thru back order review in Syspro to generate SCTs and / or POs.

***Requirements for Automation:* (1)** a minimum of 50% deposit, **(2)** item(s) must be in the back ordered column, **(3)** the special order field for the specific line(s) set to YES which is manually keyed by the operator on the 300 retail sales order by double clicking the line item(s) and changing the N to Y, **(4)** order must be in status 1.

**Step 1A:** Enter order in eCat. Enter the appropriate order header information (promo code, shipping method – pick up at store, pick up at warehouse, delivery local, or delivery out of area), shipment request, delivery type, and address type. For further information, refer to the *eCat Order Header Information* process in the Operations Manual. Ensure that the Order Type field is “Confirmed” and submit the order.

**Step 1B:** Once submitted, the Store Manager and Assistant Manager will get an email as “Successful” or “Failed.” If **failed**, forward the email to Store Support, and they will help trouble shoot why it failed. However, this should rarely, if ever, happen. If **successful**, the email comes in with all the guests’ information along with the order information for Syspro.

**Step 2:** Log into Syspro and open Sales Order Entry.

**Step 3:** A pop up box will appear that says, “Do You Wish to Reserve or Ship Stock.” Select “Place Quantity to Ship” and hit OK.

**Step 4:** In the Sales Order Entry window, click on Function then select Order Maintenance.

**Step 5:** Enter the 300 sales order number that was transmitted via email in the Order box and hit Enter.

**Step 6:** Enter the information found in step 6A – 6N in the Order Header section.

**Step 6A:** Change the order status from Forward to Open and hit Accept.

**Step 6B:** Review the Enter Order Lines section at the bottom of the page and make sure every item is in the appropriate column. If the item was **sold off the floor**, make sure the quantity of the item is reflected in the ship column. If the customer **special orders the product** (brand new out of a box from MN / MV / CL-MN), make sure the quantity of the item is in the back order column. ***NEW*: You will also need to double click on each line item that has a quantity in the back order column and needs to be special ordered to change the Special Order field from N to Y.** This, along with the minimum 50% deposit, will allow for automation.

**Step 6C:** Leave the Customer Purchase Order field as is, as this is the eCat number that transfers over to Syspro.

**Step 6D:** In the salesperson field, make sure the salesperson is correct.

**Step 6E:** In the Operator field, type in your Syspro code or use the magnifying glass to select your name from the list.

**Step 6F:** In the Order Rec Info field, select Customer, unless if you are processing an employee sale. If that is the case, select “Employee Sale.”

**Step 6G:** In the Promo Code field, select “None” unless otherwise specified by Marketing or Store Support.

**Step 6H:** Mark your shipment request to “Complete”

**Step 6I:** In the Customer Tag field, you will enter the customer’s first and last name along with the 100 SCT number. This number will be emailed to you as part of the automation process, so be sure to go back into the 300 sales order number and update this field once you receive the information.

**Step 6J:** For the ship via code field, please refer to the Shipping Matrix excel document. The code that you select for this field will determine what address is generated on the SCT. For example, if your order that is coming from MN warehouse needs to ship to your 3PL, you will select ship via code D.

**Step 6K:** In the address type field, select X

**Step 6L:** In the delivery type field, select X

**Step 6M:** Make sure your “Ship to Address” is always the end consumer’s address. This is an important part of SCT and PO automation, especially when entering a dropship or White Glove Out of Area order. If you refer to the shipping matrix for orders going directly to the customer, the code entered in the Ship via Code field tells the SCT the appropriate shipping address for the product, and which the dropship / WG OOA codes, the SCT pulls the address that is entered on the 300 sales order, which is why it is important that this address reflects the end consumer’s address at all times.

**Step 6N:** Enter the appropriate tax codes based on the order delivery or pick up location. If the customer is tax exempt or the product is shipping to a state where we do not have a store, please change the order to nontaxable and provide reason. To search for the tax codes, click on the magnifying glass next to “city,” the hit “file,” “find,” and type in the zip code in the search bar. Double click the zip code to add to the order.

**Step 7:** Verify the Order Totals are correct on the top right hand side of the page.

**Step 8:** Click “Take Payment.”

**Step 9:** A cash drawer window pops up. Make sure your store number is reflected and click “Accept.”

**Step 10:** Click on “Deposits.” Use the magnifying glass next to the “Payment Code” field to select the appropriate payment method. Click tab to get to the “deposit Amount” field and enter the amount the credit card was charged for. Tab again until you reach the “Reference” field. Here is where you enter the card type and the last 4 digits (ex. V9070, MC1000, D2008, A2004). Tab to the “Journal Notation” field and enter the customer’s last name and 300 sales order number.

**Step 11:** Click on the purple floppy disk icon to save the deposit. Print the paperwork and hit “Close” or “End Order.”

**Step 12A:** If automation was **successful**, you will receive an email like the one below. Please review in Syspro to make sure everything is correct by entering the 100 number in sales order entry.

**A picture containing text, screenshot, font, document

Description automatically generated**

**Step 12B:** If automation **fails**, you will receive an email like the below. Please review and make appropriate corrections to the 300 sales order. Automation will then reoccur.

A close-up of a email

Description automatically generated with low confidence

**Additional Information:** SCT Automation does not automatically submit Purchase Orders to the vendor. However, it does automatically create it in Syspro. When you receive the email from Syspro with your attached PO, you must submit that attachment to the vendor in a separate email.