

Single Title Special Order

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SINGLE TITLE SPECIAL ORDER

Overview

Single Title Special Order enables you to special order a title instantly with Ingram. Not only can you tell your customers that the title they are interested in is currently stocked by Ingram, but you also put a copy aside at Ingram to be shipped to the store. Creating a Single Title Special Order (STSO) assigns a special order number, generates a purchase order and transmits the purchase order electronically.

This chapter provides an explanation for the following tasks:

- Configuration
- Select a single title
- Create a Single Title Special Order
- Print STSO acknowledgment

Configuration

In order to use the STSO feature, you must have a reference database (Companion or Books In Print) loaded on your system and must also be setup to electronically order with Ingram. In addition, your Vendor Table for Ingram must have the **Stock Site** and **port** populated as shown below:

Vendor Code▶	ING	
Legacy Code	ING	
<u>Web Site</u>		
Stock Site	nashville.ingrambook.co	
Port	5501	

Vendor Code: Vendor code for Ingram

Legacy Code: Cross reference to Legacy IBID

Web Site: Ingram's Web site

Stock Site: enter **nashville.ingrambook.com**

Port: enter **5501**

Your system must also be configured properly for STSO. You may access the configuration screen which contains the STSO setups by selecting **<F2> Configuration**, **<F1> Computer Setup**, at the Page drop-down select **Ordering**. The configuration screen is shown below:

The screenshot displays the 'Computer Setup' configuration window in the IBID/ie 1.11 application. The window title is 'Computer Setup' and the date/time is 'Date: 3/31/2009 12:07:23'. The 'Page' dropdown is set to 'Ordering'. The configuration fields are as follows:

Field	Value
Page	Ordering
PO Prefix/Suffix	PO 289
Primary DC	EE
Secondary DC	DD
Vendor	ING
STSO Type	CH
STSO Prefix	ST
SO Place Holder SKU	PH

At the bottom of the screen, a keyboard shortcut bar is visible with buttons for F1 through F12. The F2 button is highlighted and labeled 'Update'.

Data Fields

PO Prefix/Suffix

These fields are not used in your STSO setup. Do not modify these fields as they are automatically maintained by the system when creating a standard purchase order.

Primary DC

Select your Ingram Primary Warehouse from the drop-down.

NV-- La Vergne, TN

CI-- Chambersburg, PA

PP-- No Longer Used

DD-- Fort Wayne, IN

KK-- No Longer Used

AA-- One Source-DC

EE-- Roseburg, OR

Secondary DC

Select your Ingram Secondary Warehouse from the drop-down.

NV-- La Vergne, TN

CI-- Chambersburg, PA

PP-- No Longer Used

DD-- Fort Wayne, IN

KK-- No Longer Used

AA-- One Source-DC

EE-- Roseburg, OR

Vendor

Enter your electronic ordering Ingram Vendor ID

STSO Type

Select your default order type for STSOs from the drop down.

CE-- asks Ingram to hold the order until a regular order is placed, then combine and ship with this order.

CH-- asks Ingram to release STSOs once daily. These orders will combine only with themselves, and with no other orders.

STSO Prefix

Enter a two digit prefix to be used on every STSO purchase order that is generated. Most IBIDie systems go out with the Prefix of ST. We suggest that you keep this prefix as it will allow you to easily identify purchase orders that were created as a result of the STSO process.

The suffix of all STSO purchase orders generated will be automatically assigned and numerically incremented with every STSO purchase order created.

SO Place Holder SKU

This field is not used in your STSO setup. Enter the placeholder item code if using the placeholder feature of Special Orders.

Working With Single Title Special Order

Selecting a Single Title, Creating a Single Title Special Order and Printing a STSO Acknowledgment

Make sure that your special order cart is empty prior to beginning.

You may access the STSO process from your reference database (Companion or Books In Print). Beginning the STSO process is easily accomplished by selecting an item within your reference database from the **inventory screen**.

Note If the item does not currently exist in your store's inventory database, when creating your STSO via the reference database, an inventory record will automatically be created for this item at the same time using the Vendor, Department & Category defaults from your configuration screens. The Misc.-2 field in the inventory record will

be filled with the word AUTO. This will easily enable you to review on screen or run a report of all items that were added from the reference database. The Notes field of the newly created inventory record will display the Publisher and Category which the reference database provider supplies enabling you to easily edit the inventory record which was automatically created from defaults to values which more accurately reflect the item.

- **<F1> Inventory**
- **<F8> Companion** or **<F8> BIP**, depending on which reference database you are using
- Lookup the item you wish to work with using one of the methods listed on the Lookup drop-down menu such as isbn, title, author, keyword(s), etc.
- **<F4> Find**
- Place your cursor anywhere on the line which displays your desired item.
- **<F8> Detail**
- You will be taken to Details/STSO screen.
- The bottom left corner of the screen will provide a grid format displaying Ingram stock status at all of it's distribution centers. This will allow you to make an informed decision as to which distribution center you will order this title.
- Inventory Info will be displayed to the right of the grid. This will list the category, price and on hand quantity from your inventory record, if this item already exists as an inventory record in your store. If this item does not currently have an inventory record in your store, these fields will be empty.
- Ordering Info is located below the Inventory Info.
 - Order Qty: will default to 1, however, you may change this quantity if you wish to order more than a quantity of 1.
 - DC: select the distribution center from which you wish to order from the drop-down selections.
 - Order Type: Choose either:
 - CE -- asks Ingram to hold the order until a regular order is placed, then combine and ship with this order.
 - CH -- asks Ingram to release STSOs once daily. These orders will combine only with themselves, and with no other orders.
 - Backorder: Place a checkmark in the box if you wish to accept backorders.
 - Greenlight: Place a checkmark in the box if you would like Ingram to fill an order from their Greenlight Distribution Center.
- After you have filled in the Ordering Information proceed to the next step.
- **<F1> Order**
- You will now be taken to the Customer Tab of the Special Order Cart.
- Select an existing customer or add a new customer as you would when entering a

standard special order.

- Once you have selected an existing customer from a search or manually added a customer, choose the manner your customer wishes to be notified from the Notify Method drop-down.
- You may add any notes or special instructions in the Notes/Instructions field.
- Click the green Create/Send SPO button located to the right of the customer name.
- A message box pops up in the center of the screen stating the Special Order number which has been created.
- Click OK
- An Ingram Purchase Order has been automatically generated and the system will now proceed to send it electronically to Ingram.
- After the transmission has completed, a Special Order Request box pops up automatically on the screen. You may view the request on the screen or
- Click the Print a copy button. A print box opens. Select your report printer and click the Print button. You may now close out of the Special Order Request box.


You may also begin the STSO process by selecting an item from your reference database via the **TBO screen**.

Note If the item does not currently exist in your store's inventory database, when creating your STSO via the reference database, an inventory record will automatically be created for this item at the same time using the Vendor, Department & Category defaults from your configuration screens. The Misc.-2 field in the inventory record will be filled with the word AUTO. This will easily enable you to review on screen or run a report of all items that were added from the reference database. The Notes field of the newly created inventory record will display the Publisher and Category which the reference database provider supplies enabling you to easily edit the inventory record which was automatically created from defaults to values which more accurately reflect the item.

- **<F4> Ordering**
- **<F1> To Be Ordered**
- Click on the Item Code Lookup Icon, which is beside the Item Code Entry Block in the center of the screen.
- **<F7> Companion** or **<F7> BIP**, depending on which reference database you are using
- Lookup the item you wish to work with using one of the methods listed on the Lookup drop-down menu such as isbn, title, author, keyword(s), etc.
- **<F4> Find**
- Place your cursor anywhere on the line which displays your desired item.
- **<F8> Detail**
- You will be taken to Details/STSO screen.
- The bottom left corner of the screen will provide a grid format displaying Ingram stock status at all of its distribution centers. This will allow you to make an

informed decision as to which distribution center you will order this title.

- Inventory Info will be displayed to the right of the grid. This will list the category, price and on hand quantity from your inventory record, if this item already exists as an inventory record in your store. If this item does not currently have an inventory record in your store, these fields will be empty.
- Ordering Info is located below the Inventory Info.
 - Order Qty: will default to 1, however, you may change this quantity if you wish to order more than a quantity of 1.
 - DC: select the distribution center from which you wish to order from the drop-down selections.
 - Order Type: Choose either:
 - CE -- asks Ingram to hold the order until a regular order is placed, then combine and ship with this order.
 - CH -- asks Ingram to release STSOs once daily. These orders will combine only with themselves, and with no other orders.
 - Backorder: Place a checkmark in the box if you wish to accept backorders.
 - Greenlight: Place a checkmark in the box if you would like Ingram to fill an order from their Greenlight Distribution Center.
- After you have filled in the Ordering Information proceed to the next step.
- **<F1> Order**
- You will now be taken to the Customer Tab of the Special Order Cart.
- Select an existing customer or add a new customer as you would when entering a standard special order.
- Once you have selected an existing customer from a search or manually added a customer, choose the manor your customer wishes to be notified from the Notify Method drop-down.
- You may add any notes or special instructions in the Notes/Instructions field.
- Click the green Create/Send SPO button located to the right of the customer name.
- A message box pops up in the center of the screen stating the Special Order number which has been created.
- Click OK
- An Ingram Purchase Order has been automatically generated and the system will now proceed to send it electronically to Ingram.
- After the transmission has completed, a Special Order Request box pops up automatically on the screen. You may view the request on the screen or
- Click the Print a copy button. A print box opens. Select your report printer and click the Print button. You may now close out of the Special Order Request box.

Additionally, you may also begin the STSO process by selecting an item from your reference database via the **globe icon**  which is located on the right side of the IBIDie title bar.

Note If the item does not currently exist in your store's inventory database, when creating your STSO via the reference database, an inventory record will automatically be created for this item at the same time using the Vendor, Department & Category defaults from your configuration screens. The Misc.-2 field in the inventory record will be filled with the word AUTO. This will easily enable you to review on screen or run a report of all items that were added from the reference database. The Notes field of the newly created inventory record will display the Publisher and Category which the reference database provider supplies enabling you to easily edit the inventory record which was automatically created from defaults to values which more accurately reflect the item.

- Click on the globe icon.
- Select your reference database (Companion or Books in Print) from the drop-down.
- Lookup the item you wish to work with using one of the methods listed on the Lookup drop-down menu such as isbn, title, author, keyword(s), etc.
- <F4> Find
- Place your cursor anywhere on the line which displays your desired item.
- **<F8> Detail**
- You will be taken to Details/STSO screen.
- The bottom left corner of the screen will provide a grid format displaying Ingram stock status at all of it's distribution centers. This will allow you to make an informed decision as to which distribution center you will order this title.
- Inventory Info will be displayed to the right of the grid. This will list the category, price and on hand quantity from your inventory record, if this item already exists as an inventory record in your store. If this item does not currently have an inventory record in your store, these fields will be empty.
- Ordering Info is located below the Inventory Info.
 - Order Qty: will default to 1, however, you may change this quantity if you wish to order more than a quantity of 1.
 - DC: select the distribution center from which you wish to order from the drop-down selections.
 - Order Type: Choose either:
 - CE -- asks Ingram to hold the order until a regular order is placed, then combine and ship with this order.
 - CH -- asks Ingram to release STSOs once daily. These orders will combine only with themselves, and with no other orders.
 - Backorder: Place a checkmark in the box if you wish to accept backorders.
 - Greenlight: Place a checkmark in the box if you would like Ingram to fill an order from their Greenlight Distribution Center.

- After you have filled in the Ordering Information proceed to the next step.
- **<F1> Order**
- You will now be taken to the Customer Tab of the Special Order Cart.
- Select an existing customer or add a new customer as you would when entering a standard special order.
- Once you have selected an existing customer from a search or manually added a customer, choose the manor your customer wishes to be notified from the Notify Method drop-down.
- You may add any notes or special instructions in the Notes/Instructions field.
- Click the green Create/Send SPO button located to the right of the customer name.
- A message box pops up in the center of the screen stating the Special Order number which has been created.
- Click OK
- An Ingram Purchase Order has been automatically generated and the system will now proceed to send it electronically to Ingram.
- After the transmission has completed, a Special Order Request box pops up automatically on the screen. You may view the request on the screen or
- Click the Print a copy button. A print box opens. Select your report printer and click the Print button. You may now close out of the Special Order Request box.