RESOLV OPERATIONS TRANSACTION CENTER AND ANALYSIS

USER MANUAL

Version 10.0

PRESENTED BY

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SAP Business One Integration

Resolv Operations Transaction Center and Analysis is part of the Resolv Suite, which has been certified by SAP as conforming to SAP's standards for Business One add-on solutions.

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SAP Business One Integration

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USER GUIDE

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Operations Transaction Center

Summary of features:

- *Zero Setup or Configuration required.*

- *Customer Centric Inquiry:*
    - See all data related to a customer
    - See all customers related to a Salesperson
    - Integrate with AR Collections module

- *Vendor Centric Inquiry:*
    - See all relevant data for a vendor
    - See all relevant data related to a buyer
    - Full transactional review of open and historical documents

- *Item Centric Inquiry:*
    - See all sides of an inventory inquiry including supply, demand and history
    - Generate new transactions with a click of a button

Setups

There is no setup required for ***Resolv Operations Transaction Center***. The analysis is immediately available on all Business One data, old and new. The only requirement is to license the module.

Preparation

Use of base SAP Business One features greatly enhances the abilities of OTC. For example, thoughtful creation of Item Groups, or setting up Manufacturer data on the Item Master provides attributes that can be used for filtering and or analysis.

Glossary of Terms and Documents

Since the use of the ***Resolv Operations Transaction Center*** functionality encompasses many features from SAP Business One and the enhancements provided by the other modules in the Resolv suite, it can be helpful to understand what data is available and what the filters are based upon. This section provides a glossary that can be used to reference the underlying SAP and Resolv functions, as well as provide a comprehensive overview of what can be accessed via ***Resolv Operations Transaction Center***.

Activity	This field allows the filtering of SAP Business One's standard Activity Documents based on the 'Action' field. The valid values for the field are as follows: • Phone Call • Meeting • Task • Note • Campaign • Other
Activity (tab)	Activities refer to interactions you have with business partners, such as phone calls, meetings, tasks, or other types of activities. Activities can also be linked to Item Master data record, and/or or marked as personal. You are able to manage a one-time activity, follow Up activities or recurring activities. For more information, please refer to the SAP Help page for Activities Management.

Activity Subject	This field allows the filtering of SAP Business One's standard Activity Documents based on the 'CntctSbjct' field. This field is optional on the Activity Document and provides the ability to select another detailed classification of the activity to expand upon the Activity Type. This field contains user defined data as created in the Activity Subjects Setup window and is linked to a related Activity Type. Note that OTC allows the selection of any existing Subject or the default of "All" which does not filter the results on the Activity tab.
Activity Type	This field allows the filtering of SAP Business One's standard Activity Documents based on the 'CntctType' field. This field is optional on the Activity Document and provides the ability to select a more detailed classification of the activity than the Action (Activity) alone. This field contains user defined data as created in the Activity Subjects Setup window and is linked to a related Activity Type. Note that OTC allows the selection of any existing Subject or the default of "All" which does not filter the results on the Activity tab.
Alternative Items	This button will allow you to view the alternative items for the item on the row you have highlighted. The standard SAP Business One alternative item screen will be displayed.
AP Credit Memo	This tab displays the standard SAP Business One marketing document for A/P Credit Memos. If goods are returned to the vendor or a mistake was made while creating the AP Invoice documents, then the A/P Credit Memo is the clearing document for the A/P invoice. You can reverse the A/P invoice transaction either partially or completely by creating an A/P credit memo. For more information, please refer to the SAP Help page for A/P Credit Memo.
AP Down Payment Invoice	This tab displays the standard SAP Business One marketing document for A/P Down Payment Invoices.

	If one of your vendors requires you to make a down payment before shipping the goods you ordered, you can map this business practice by creating an A/P down payment invoice. After you make the payment to your vendor, you can deduct the down payment amount from the final invoice. For more information, please refer to the SAP Help page for Down Payments.
AP Invoice	This tab displays the standard SAP Business One marketing document for A/P Invoices. The A/P invoice is a request for outgoing payment. It also records the cost in the profit and loss statement. When you receive an A/P invoice, SAP Business One posts the related accounts for the vendor in the accounting system. For more information, please refer to the SAP Help page for A/P Invoices.
AP Reserve Invoice	This tab displays the standard SAP Business One marketing document for A/P Reserve Invoices. You use A/P Reserve Invoices to document an A/P invoice you receive from a vendor before goods arrive. After you receive the goods, you create a Goods Receipt PO based on the A/P Reserve Invoice to update inventory quantities and inventory values. For more information, please refer to the SAP Help page for A/P Reserve Invoices.
Approved Documents	This filter is a used to limit the results within Operations Transaction Center when looking at Sales Order or Sales Order EDI documents. This utilizes the Confirmed field on the Sales Order header (Approved check box on the Logistics tab). An order is considered Approved if the value of the field is 'Y' or checked and is considered Unapproved if the value of the field is 'N' or unchecked. The filter criteria is a radio button selection with the following (mutually exclusive) options: • Approved Sales Orders • UnApproved Sales Orders • Both

	Note that there are a variety of ways in which the Confirmed field can be controlled and defaulted. This include the Document Settings > Sales Order tab, manually maintaining the field by the user interface, the use of the SAP Business One Approvals, or Resolv Sales Order Approvals.
AR Collections Tracking Document (Related Collections)	See **Related Collections – AR Collections**
AR Credit Memo	See **Credit Memo**.
AR Down Payment Invoice	This tab displays the standard SAP Business One marketing document for A/R Down Payment Invoices. If you require your customers to make a down payment before shipping the goods they ordered, you can map this business practice by creating an A/R down payment invoice. After you receive the payment from your customer, you can deduct the down payment amount from the final invoice. For more information, please refer to the SAP Help page for Down Payments.
AR Invoice	This tab displays the standard SAP Business One marketing document for A/R Invoices. The A/R invoice is a request for an incoming payment. It also records the revenue in the profit and loss statement. When you create an A/R invoice, SAP Business One posts the related accounts for the customer in the accounting system. For more information, please refer to the SAP Help page for A/R Invoices.
AR Reserve Invoice	See **Reserve Invoice**
Avail to promise	This button will allow you to view the standard SAP Business One Inventory Status (Available-to-Promise) screen for the item on the row you have highlighted.
Base Document	This field is used in the WMS Hub screen. It is used to filter on a specific document type or “ALL” document types. The available document types are: Inventory Transfer Request, Production Order, Reserve Invoice and Sales Order.

Blanket Agreement

This tab displays the standard SAP Business One marketing document for Blanket Agreements.

This document is available on both Customer and Vendor inquires. Blanket agreements are long-term arrangements between a purchasing organization and a vendor or a sales organization and a customer, for the supply of items or provision of services over a period of time based on predefined terms and conditions. Blanket agreements can be used as a basis for expected revenue forecasts, quantity reservation, and capacity planning.

For more information, please refer to the SAP Help page for Blanket Agreements.

Closed Documents

This filter is used to limit the results within Operations Transaction Center when looking at activities and marketing documents. This utilizes the ‘DocStatus’ field on the document header (Status field on the header). A document is considered closed if the value of the field is ‘C’.

The filter criteria is a radio button selection with the following (mutually exclusive) options:

- Open Documents
- Closed Documents
- Both

Note that documents can have their status updated automatically based on standard transactional processing, or the status can be closed via the user choosing the close or cancel right click options.

Container

This tab will display a listing of Resolv documents that are part of the Container Management module called Container Entry documents.

A container entry document allows the business flow on purchasing documents to represent incoming containerized shipments. This includes the ability to select multiple purchase orders, from multiple vendors, and or any portion of the PO or PO lines and group them together for inbound logistics tracking including the in transit statuses, and enhanced date management. . The products can then be packaged into one or more containers, allowing tracking of seal and inspection numbers, and ease of use when receipt of the goods occur. The Goods Receipt PO can be generated for individual

	containers, or the whole shipment. Landed Costs can be tracked in advance of the GRPO, and automatically applied to the GRPOs when created. ***Note: This tab will only appear if Resolv Container Management is licensed and enabled.*** For more information, please see the Container Management manual.
Container Status	This filter is used to filter out Container documents so that you can view only the documents that have the specific status you are looking for. You can select “Based on document options” to see all documents. The filter criteria is a “choose from” list that is populated by the values in the Salesperson table OSLP. A value is added for All Sales Employees which does not filter the results.
Cost & Availability	This tab will provide a lot of information on costing and availability. This tab is found in the Vendor Hub screen. This tab provides Item availability and costing information for groups of items at 1 time based on the filtering options selected. The filters available are: • Item • Item Group • Price List
Credit Memo	This tab displays the standard SAP Business One marketing document for A/R Credit Memos. If goods are returned by the customer, or a mistake was made while creating the AR Invoice documents, then the A/R Credit Memo is the clearing document for the A/R invoice. You can reverse the A/R invoice transaction either partially or completely by creating an A/R credit memo. For more information, please refer to the SAP Help page for A/R Credit Memos.
Customer	This filter is a condition that can be used to limit the results within the OTC screens. This utilizes the ‘CardCode’ field on the document header (Customer field on the header).

	The filter criteria used is a “choose from” list that is populated by the values in the BP Master Data table OCRD filtered to the Customer type. When left blank, OTC does not filter the results.
Delivery	This tab displays the standard SAP Business One marketing document for Deliveries. You use a Delivery to document a shipment of goods, which is typically based on a Sales Order. Adding a Delivery will update on hand, committed and available, inventory quantities and inventory values. In addition, postings are made to the Inventory and Cost of Goods sold G/L accounts. For more information, please refer to the SAP Help page for Delivery.
Document Date (From and To)	This filter can be used to limit the results within Operations Transaction Center. This utilizes the Document Date field on the document header. The filter uses the standard SAP Business One date entry. The user can enter a “From” date and a “To” date. Either or both dates can be left blank indicating there is no filtering on that criteria. The default entry is both the From and To dates will be blank.
Document Delivery	The Document Delivery Button is used to pass the selected records from Operations Transaction Center to the Resolv Document Delivery Module. To select a record, highlight the row. To select multiple records, you can use the Shift Key or Control Keys to select rows, much like you would in Excel. Document Delivery enhances SAP Business One’s ability to communicate with Customers and Vendors by automatically emailing, faxing or printing marketing documents. The reports are saved as attachments, and the messages can be pre-created with templates including dynamic data from standard and user defined fields. Additionally, rules can be created to ensure the document goes to the right contact based on which document is sent, including to multiple recipients and/or with multiple reports. For more information, please refer to the Document Delivery manual.

Down Payment	See **AR Down Payment Invoice**.
Equipment Rental	This tab will display a listing of Resolv documents that are part of the Equipment Rental module. You can filter on the following rental types: • Rent • Re-Rent • Both Rent & Re-Rent • Sell Items You can filter on Rental Warehouse (default is ALL) You can filter on Billing Cycle (default is ALL) Sub-tabs available from Customer Hub: • Quotations • Orders • Pick Lists • Deliveries • Invoices • Freight Management • Rental Return Requests • Rental Exchange Requests • Rental Returns • Return • A/R Credit Memo Sub-tabs available from Vendor Inquiry: • Purchase Orders • Receipts ***Note: This tab will only appear if Resolv Equipment Rental module is licensed and enabled.*** For more information, please see the Equipment Rental manual.
Find Base Number	This field is used in the WMS Hub screen. It is used to locate a specific base document. The first occurrence of the row where a match is found on the Base Document number entered will be highlighted.
Find Document Number	This field is used to locate a specific document. The first occurrence of the row where a match is found on the Document number entered will be highlighted.

Freight Management	This tab will display a listing of Resolv documents that are part of the Freight Management module. ***Note: This tab will only appear if Resolv Freight Management is licensed and enabled.*** For more information, please see the Freight Management manual.
Goods Receipt PO	See **Receipt PO**
Goods Return	This tab displays the standard SAP Business One marketing document for Goods Return. The goods return document is used to return delivered goods to vendors or to reverse a purchasing transaction for an item completely or partially, for example, a goods receipt PO. When you create a goods return, the goods are issued from the warehouse and the quantities are reduced. SAP Business One automatically creates the relevant posting to update the inventory values as well. For more information, please refer to the SAP Help page for Goods Return.
Incoming Payment	This tab displays the standard SAP Business One marketing document for Incoming Payments. An Incoming payment is used to record each time your company receives a payment from a customer, vendor, or account and support the following payment means: Cash, Check, Credit Card, Bank Transfer. For more information, please refer to the SAP Help page for Incoming Payment.

Inventory – Inventory Transfer Requests	This sub tab to the Inventory Tab on the OTC Item Hub displays the standard SAP Business One marketing document for Inventory Transfer Requests. An Inventory Transfer Request allows for documentation of a planned transfer or provides a mechanism to request a transfer. The document does impact committed and available inventory but does not change on hand quantities. If accepted, the document is closed by creating a linked Inventory Transfer document. Note: When implementing Resolv WMS, there is a feature that enhances Inventory Transfer Requests by creating and In Transit warehouse. Thus each Inventory Transfer Request is separated into two separate documents. Both will appear in the OTC window. For more information, please refer to the SAP Help page for Inventory Transfer Request Window.
Inventory – Item Locations	This sub tab to the Inventory Tab on the OTC Item Hub displays the enhanced information about On Hand Inventory and SAP Bin Locations. This tab will show the quantity of the item in a Bin Location, the type of Bin Location, the date of the last transaction, and allocation information for WMS transactions.
Inventory – Suggested Transfers	This sub tab to the Inventory Tab on the OTC Item Hub displays the Resolv Suggested Bin Transfer (SBT) that is related to the Resolv WMS Module. A Suggested Bin Transfer is created when WMS rules indicate that inventory should be moved based on order reservations to a reserved bin. This could occurs when inventory is available in an unreserved location, and is needed in a reserve location. This transaction can only be processed on the WMS hand held. It is distinct from a directed put away. Note that this tab will only appear if Resolv WMS and Order Reservations are licensed and enabled. For more information, please see the Resolv Warehouse Management manual.
Inventory Planning – Controls	This sub-tab of Inventory Planning on the OTC – Item Hub displays the Inventory Planning Controls information for the individual item and warehouse selected. This is the same information found in the Inventory Planning sub-tab Warehouse Item Planning sub-tab Controls.

	Note: This tab will only appear if the Resolv Inventory Planning module is licensed and enabled. For more information, please see the Inventory Planning manual.
Inventory Planning – Forecast	This sub-tab of Inventory Planning on the OTC – Item Hub displays the Inventory Planning Forecast information for the individual item and warehouse selected. This is the same information found in the Inventory Planning sub-tab Warehouse Item Planning sub-tab Forecast. ***Note: This tab will only appear if the Resolv Inventory Planning module is licensed and enabled.*** For more information, please see the Inventory Planning manual.
Inventory Planning – Usage	This sub-tab of Inventory Planning on the OTC – Item Hub displays the Inventory Planning Usage information for the individual item and warehouse selected. This is the same information found in the Inventory Planning sub-tab Warehouse Item Planning sub-tab Usage. ***Note: This tab will only appear if the Resolv Inventory Planning module is licensed and enabled.*** For more information, please see the Inventory Planning manual.
Invoice	See **A/R Invoice**
Last Prices Report	This button will allow you to view the standard SAP Business One Last Prices Report screen for the item on the row you have highlighted.
New Document	This button is used to allow you to quickly create a new document based on the tab you are in. Some of the fields on the new document may be filled in for you if they were populated in the selection screen i.e. Customer Number.
Open Documents	This filter is a condition that can be used to limit the results within Operations Transaction Center when looking at activities and marketing documents. This utilizes the 'DocStatus' field on the document header (Status field on the

	header). A document is considered open if the value of the field is ‘O’. The filter criteria is a radio button selection with the following (mutually exclusive) options: • Open Documents • Closed Documents • Both ***Note: Documents can have their status updated automatically based on standard transactional processing and will only be open if one or more lines has not been fully processed and/or if the user has not manually changed the status to closed or cancelled. SAP Business One also provides functionality that can reopen a document in certain cases, such as a cancellation or being copied to particular target documents. The controls for these functions can be found in the Document Settings administrative screen.***
Opportunity	Opportunities are used to track and analyze pending sales according to the progress of activities such as meetings, negotiations, and other proceedings in the sales pipeline. For more information, please refer to the SAP Help page for Sales Opportunities.
Order Pad	This checkbox can be found on the Price& Availability tab of the Customer Hub. When checked it activates the following options: **Order Qty** – This column will be added to the grid. This column is used to quickly select items the customer wishes to purchase and then create a quote, order or save entry for later use. **Load Entry –** This option allows you to load a previously saved “Order Pad” session. **Save Entry -** This option allows you to save the selections you have made on the screen with the “Order Qty” populated so you can recall it at a later date. **Create Quote –** This option will create a quote with the items that have been populated with entries in the “Order Qty” column. You must have a Customer Number entered.

	Save Entry - This option will create a sales order with the items that have been populated with entries in the "Order Qty" column. You must have a Customer Number entered.
Outgoing Payments	This tab displays the standard SAP Business One marketing document for Outgoing Payments. An Outgoing payment is used to record each time your company makes a payment from a customer, vendor, or account and support the following payment means: Cash, Check, Credit Card, Bank Transfer. For more information, please refer to the SAP Help page for Outgoing Payments.
Previous Sales	This checkbox can be found on the Price& Availability tab of the Customer Hub and can only be used with a Customer Number Entered. When activated the grid will be displayed with the customers past sales using the filters selected.
Pick Date	This filter is used to limit the results to a specific Pick Date. The standard SAP Business One date functionality is used here. If the field is left blank no filtering will take place.
Picker	This field is used in the WMS Picks screen. It is used to filter on a specific Picker or "ALL" Pickers. The user will select from a pull-down list.
Price & Availability	This tab is part of the Customer Hub selection. The filters available are: • Item • Item Group • Price List These filters will adjust the items in the grid based on the user's selection. There is a "Order Qty" column that allows you to enter the qty the customer wishes to purchase. When all your quantities have been entered, you can use the "Save Entry" button so you can recall it at a later date. You can "Create Quote" which will create a quote with the items that have Order Qty values not equal to zero. You can "Create Order" which will create a Sales Order with the items that have Order Qty populated not equal to zero.
Production Orders – Disassembly Orders	This sub tab of the Production Order on the OTC – Item Hub displays the standard SAP Business One marketing document for Production Orders that have a Type of 'Disassembly'.

A Production Order is a document that identifies a finished good and components that make up the finished good. When the Type is Disassembly processing the Production Order will result in the consumption of the finished good and a corresponding increase in inventory for the component items. This means you have taken the whole and break it down into is parts. When working with a Disassembly Production Order, the relationship between the finished good and the components is copied from a Bill of Materials, or BOM.

For more information, please refer to the SAP Help page for Production.

Production Orders – Issues for Production

This sub tab of the Production Order on the OTC – Item Hub displays the standard SAP Business One marketing document for Issue for Production.

This document is used with Production Orders to reflect that component item inventory has been assigned to the Production Order. Generally, this means it was a reduction of on hand inventory, and has its value offset to a Work In Progress or WIP account. This document is generate for manually issued items, where black flush items are consumed during a Receipt from Production (completion).

For more information, please refer to the SAP Help page for Issues for Production Window.

Production Orders – Receipt from Production

This sub tab of the Production Order on the OTC – Item Hub displays the standard SAP Business One marketing document Receipt from Production.

This document is used with Production Order to reflect that the Finished Good has been produced and assigned to the Production Order. This generally mean that there is an increase of on hand inventory for the goods being produced. This is offset against the WIP account.

For more information, please refer to the SAP Help page for Receipt from Production Window.

Production Orders – Special Orders

This sub tab of the Production Order on the OTC – Item Hub displays the standard SAP Business One marketing document for Production Orders that have a Type of ‘Special’.

A Production Order is a document that identifies a finished good and components that make up the finished good. When the Type is Special processing the Production Order will result

	in the addition of the finished good to inventory and a corresponding decrease in inventory for the component items. This means you have taken the parts and assembled it down its parts. When working with a Special Production Order, the relationship between the finished good and the components is does not have a Bill of Materials or BOM. For more information, please refer to the SAP Help page for Production.
Production Orders – Standard Orders	This sub tab of the Production Order on the OTC – Item Hub displays the standard SAP Business One marketing document for Production Orders that have a Type of ‘Standard’. A Production Order is a document that identifies a finished good and components that make up the finished good. When the Type is Standard processing the Production Order will result in the addition of the finished good to inventory and a corresponding decrease in inventory for the component items. This means you have taken the parts and assembled it down its parts. When working with a Standard Production Order, the relationship between the finished good and the components is defined by a Bill of Materials, or BOM. For more information, please refer to the SAP Help page for Production.
Production Orders – Quality Control	This sub tab of the Production Order on the OTC – Item Hub displays the standard SAP Business One marketing document for Production Orders that are going through the Quality Control module. For more information, please refer to the SAP Help page for Production.
Purchase Order	This tab displays the standard SAP Business One marketing document for Purchase Orders. The purchase order is a document used to request items or services from a vendor at an agreed upon price. For more information, please refer to the SAP Help page for Purchase Order.
Purchase Quotation	This tab displays the standard SAP Business One marketing document for Purchase Quotation. The purchase quotation is a document used as part of the request for quote process to request items or services from

	vendors and can be used to compare and shop for an improved price. For more information, please see the Quality Control manual.
Quality Control	This tab will display a listing of Resolv documents that are part of the Quality Control module. There is an option to display either “processed” or “Not processed” documents. There are 2 sub-tabs to this tab: • Sales Order tab • Sales Return tab ***Note: This tab will only appear if the Resolv Quality Control module is licensed and enabled.*** For more information, please see the Quality Control manual.
Quality Control – OTC Item Hub	There is an option to display either “Processed” or “Not processed” documents. There are 2 sub-tabs: • Goods Receipt • Transfer ***Note: This tab will only appear if the Resolv Quality Control module is licensed and enabled.*** For more information, please see the Quality Control manual.
Receipt PO	This tab displays the standard SAP Business One marketing document for Goods Receipt POs. You create this document when you receive goods from the vendor. When you create a goods receipt PO, SAP Business One receives the goods into the warehouse, updates the quantities, and creates an accounting journal entry. For more information, please refer to the SAP Help page for Goods Receipt PO.
Related Collections – AR Collections	This button will display a listing of Resolv documents that are part of the AR Collections module called Collections Tracking. The use of this list is similar to the functionality provided by the SAP Business One Activities Overview list you can review when choosing Related Activities on a document or BP Master

	Data Record. By default, only open Collections Tracking Documents are shown, but all related collections can be shown by unchecking the filter box. A collection tracking document allows for effective AR management and improved cash flow by identifying multiple SAP marketing documents (typically overdue AR Invoices) that need to be followed up upon with the customer. It also provides a central place to record information about the interactions with the customer, their promise to pay information, as well as when and who is responsible for follow up. For more information about the Collections Tracking document or the AR Collections workflow, please review the manual for AR Collections.
Reserve Invoice	This tab displays the standard SAP Business One marketing document for A/R Reserve Invoices. You use A/R Reserve Invoices to document an A/R invoice you create for a customer before goods are delivered. After you ship the goods, you create a Delivery based on the A/R Reserve Invoice to update inventory quantities and inventory values. For more information, please refer to the SAP Help page for A/R Reserve Invoices.
Reserved Items	This filter is a condition that can be used to limit the results within Operations Transaction Center when looking at the Sales Quotation, Sales Order and Purchase Order marketing documents. This utilizes the Resolv Order Reservations module to determine which document lines are included in a supply or demand reservation. The filter criteria is a radio button with the following (mutually exclusive) options: • Reserved Items • Un-Reserved Items • Both ***Note: This filter will only appear if Resolv Order Reservations is licensed and enabled.*** For more information, please refer to the Order Reservations manual.

Return	This tab displays the standard SAP Business One marketing document for Sales Return. You use a Sales Return if a customer wants to return goods, or if a mistake was made on the delivery. When you create the return, the system corrects the inventory quantities. For more information, please refer to the SAP Help page for Return.
Return Request	This tab displays the standard SAP Business One marketing document for Sales Return Request. For more information, please refer to the SAP Help page for Return Request.
Sales Order	This tab displays the standard SAP Business One marketing document for Sales Orders. The sales order is a commitment from a customer or lead to buy a product or service. For more information, please refer to the SAP Help page for Sales Order.
Sales Order EDI – 810 Invoices	This sub tab of the Sales Order EDI tab displays standard SAP Business One AR Invoice marketing documents that are configured to utilize the Resolv EDI module with the intent that they will be transmitted in an EDI format to a trading partner (BP code). These are Invoices that are designated as EDI Invoices because the EDI Partner ID UDF (U_AISEDIPART) is populated. ***Note: This tab will only appear if Resolv EDI is licensed and enabled.*** For more information, please refer to the Resolv EDI manual.
Sales Order EDI – 812 Credit Memos	This sub tab of the Sales Order EDI tab displays standard SAP Business One AR Credit Memo marketing documents that are configured to utilize the Resolv EDI module with the intent that they will be transmitted in an EDI format to a trading partner (BP code).

	These are Credit Memos that are designated as EDI Credit Memos because the EDI Partner ID UDF (U_AISEDIPART) is populated. ***Note: This tab will only appear if Resolv EDI is licensed and enabled.*** For more information, please refer to the Resolv EDI manual.
Sales Order EDI – 850 – Orders	This sub tab of the Sales Order EDI tab displays standard SAP Business One Sales Order marketing documents that have been transmitted via EDI. These are Sales Orders that are designated as EDI Sales Orders because the EDI Partner ID UDF (U_AISEDIPART) is populated. ***Note: This tab will only appear if Resolv EDI is licensed and enabled.*** For more information, please refer to the Resolv EDI manual.
Sales Order EDI – 855 Acknowledgements	This sub tab of the Sales Order EDI tab displays standard SAP Business One Sales Order marketing documents that are configured to utilize the Resolv EDI module with the intent that they will be transmitting an 855 to a trading partner (BP code). When the Acknowledgement is sent the field (U_AISEDIDATE) will be populated. The system knows an 855 is required by checking the EDI BP configuration screen and looking at the 855 check box. ***Note**: **This tab will only appear if Resolv EDI is licensed and enabled.*** For more information, please refer to the Resolv EDI manual.
Sales Order EDI – 856 Delivery ASN	This sub tab of the Sales Order EDI tab displays standard SAP Business One Delivery marketing documents that are configured to utilize the Resolv EDI module with the intent that they will be transmitted in an EDI format to a trading partner (BP code). These are Deliveries that are designated as EDI Deliveries because the EDI Partner ID UDF (U_AISEDIPART) is populated ***Note**: **This tab will only appear if Resolv EDI is licensed and enabled.***

	For more information, please refer to the Resolv EDI manual.
Salesperson	This filter is used to limit the results within Operations Transaction Center. This utilizes the ‘SlpCode’ field on the document header (Salesperson field on the header). The filter criteria is a “choose from” list that is populated by the values in the Salesperson table OSLP. A value is added for All Sales Employees which does not filter the results.
Service	This tab displays the standard SAP Business One transactions for Service. There are 2 other filters available in this selection: • Equipment Territory - choose from a dropdown list • Equipment Technician – choose from a dropdown list There are 3 sub-tabs as part of this selection: • Equipment Card • Service Contract • Service Calls You use a Sales Return if a customer wants to return goods, or if a mistake was made on the delivery. When you create the return, the system corrects the inventory quantities. For more information, please refer to the SAP Help page for Service.
Ship To Address	This filter is used to limit the results within Operations Transaction Center. This utilizes the ship to field on the document header. This filter is only active if a “Customer” is entered. If this is the case the user will have a “choose from” list of the Customer’s ship to’s to pick from. A value is added for All Ship To Addresses which does not filter the results. The initial value of the field is defaulted to “All Ship To Addresses”.
Ship Type	This filter is used to limit the results within Operations Transaction Center. A specific Ship Type can be selected, or “ALL” can be chosen. A “choose from” list will be provided that is populated by the values in the SAP Shipping Type screen.

Show Batch Detail	This filter is used to control if the batch number associated with the item on the row will be displayed. This check box will only appear if the “Show Item Detail” check box is active.
Show Item Detail	This filter is used to limit whether item details will be displayed for the documents within the tab selected. If this check box is active each item on the transaction will be displayed on a separate row. Information that will display will include but not be limited to item number, item description, qty, price etc.
Tracking Number	This field is used to locate a specific tracking number. The tracking number entered here must match the tracking number on the document exactly for the row to be displayed. Partial matches will not be displayed.
Unshipped	This filter can be used to limit the results within Operations Transaction Center when looking at Freight Management documents. The filter criteria uses a radio button selection with the following (mutually exclusive) options: • Unshipped • Shipped • Canceled
Vendor	This filter allows the results within the OTC screens to be further refined. This utilizes the ‘CardCode’ field on the document header (Vendor field on the header). The filter criteria is a “choose from” list that is populated by the values in the BP Master Data table OCRD filtered to the Vendor (Supplier) type. When left blank, OTC does not filter the results.
Warehouse	This filter is a condition that can be used to limit the results within the OTC screens. This utilizes the ‘Whse’ field on the document rows. The filter criteria is a “choose from” list that is populated by the values in the Warehouse table (OWHS). A value is added for “All Warehouses” which does not filter the results.
WMS	This tab is found in the Item Hub selection under the Sales A/R sub tab.

This tab will display a listing of Resolv documents that are part of the WMS module called Resolv Warehouse Management System.

The follow fields are available for selection to filter the results you are looking for:

- Picker
- Ship Type
- Tran. Type
- Pick Date
- Pick Status
- Priority

Note: This tab will only appear if Resolv Warehouse Management System is licensed and enabled.

For more information, please see the Warehouse Management System manual.

WMS Picks

This tab is found in the Item Hub selection.
This tab will display a listing of pick lists that are part of the Inventory pick lists.

The follow fields are available for selection to filter the results you are looking for:

- Base Document
- Picker
- Ship Type
- Pick Date

Note: This tab will only appear if Resolv Warehouse Management System is licensed and enabled.

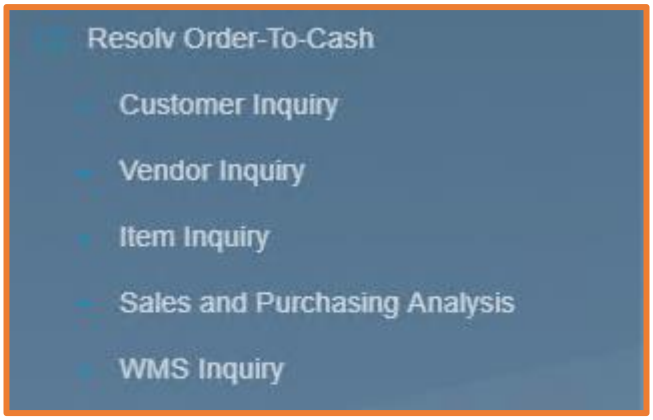
For more information, please see the Warehouse Management System manual.

Resolv Operations Transaction Center (OTC) Menu

Although the Operations Transaction Center module can be found on the Resolv menu, it is a tightly integrated analysis tool which is pervasive throughout the system. It provides the ability to use the golden drill down arrow. Since it is frequently used, the way it is used varies based upon the needs of the individual user.

Many users “start” their work by opening OTC and branch out to other areas of SAP Business One as needed from OTC, return to OTC as soon as they complete the tasks, ready to accept any new work that comes up. Other users work within traditionally defined workflows, such as entering Sales Orders, but find a need to get more information about the customer than is available on the BP Master, so with a click they open OTC, get the insight they need, and return to work.

Resolv > Resolv Operations Transaction Center

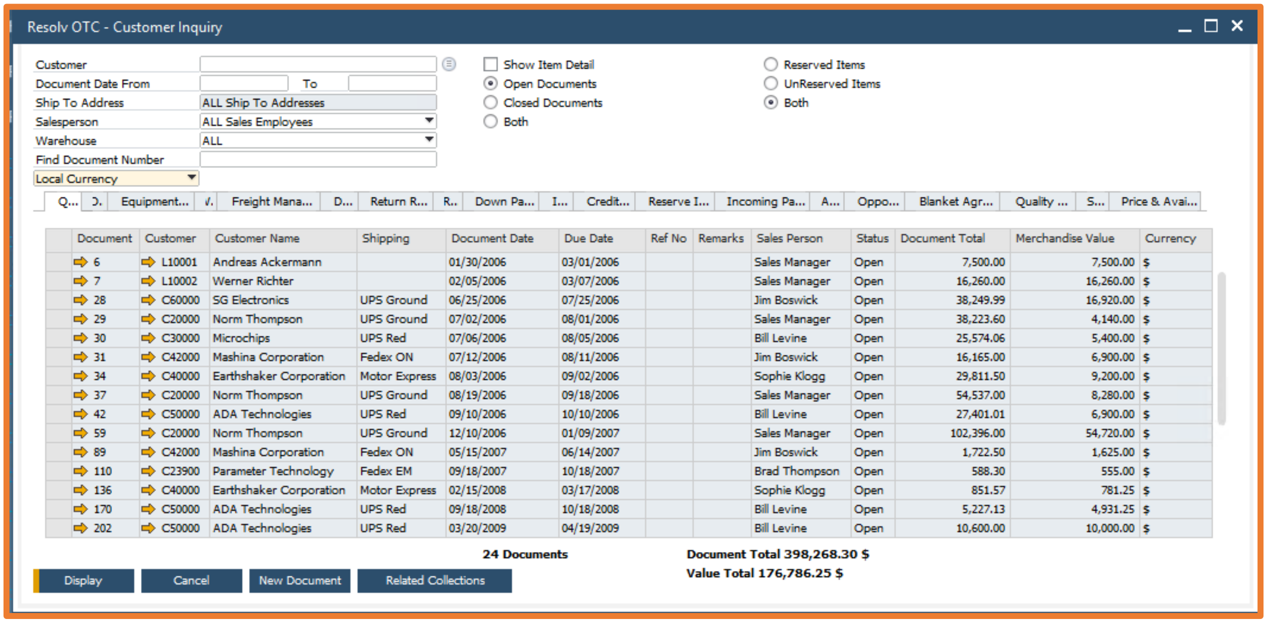


Resolv OTC – Customer Hub

The Resolv OTC Customer Hub offers an overview of all the SAP Documents and Activity that can be associated with customers. This is a powerful tool that can be used as an analytic review, or a customer service launch pad.

When using the Customer Hub, there are two primary modes.

- When launched from a Customer Record, or if a customer filter is added, the entire screen can be limited to a single customer. This allows for rapidly toggling between the tabs to get information relevant to the customer, such as Order status, or Opportunity and Activity overviews.
- When Opened from the Main Menu, or when the customer filter is cleared, the screen becomes a reporting overview. This allows insight into the activity organized by Salesperson, or Warehouses. It is easy to see Open documents only. This can use used as a dashboard to get up to the second overview of daily progress



Customer
Document Date From To
Ship To Address: ALL Ship To Addresses
Salesperson: ALL Sales Employees
Warehouse: ALL
Find Document Number
Local Currency

☐ Show Item Detail
● Open Documents
○ Closed Documents
○ Both

○ Reserved Items
○ UnReserved Items
● Both

Document	Customer	Customer Name	Shipping	Document Date	Due Date	Ref No	Remarks	Sales Person	Status	Document Total	Merchandise Value	Currency
⇨ 6	⇨ L10001	Andreas Ackermann		01/30/2006	03/01/2006			Sales Manager	Open	7,500.00	7,500.00	$
⇨ 7	⇨ L10002	Werner Richter		02/05/2006	03/07/2006			Sales Manager	Open	16,260.00	16,260.00	$
⇨ 28	⇨ C60000	SG Electronics	UPS Ground	06/25/2006	07/25/2006			Jim Boswick	Open	38,249.99	16,920.00	$
⇨ 29	⇨ C20000	Norm Thompson	UPS Ground	07/02/2006	08/01/2006			Sales Manager	Open	38,223.60	4,140.00	$
⇨ 30	⇨ C30000	Microchips	UPS Red	07/06/2006	08/05/2006			Bill Levine	Open	25,574.06	5,400.00	$
⇨ 31	⇨ C42000	Mashina Corporation	Fedex ON	07/12/2006	08/11/2006			Jim Boswick	Open	16,165.00	6,900.00	$
⇨ 34	⇨ C40000	Earthshaker Corporation	Motor Express	08/03/2006	09/02/2006			Sophie Klogg	Open	29,811.50	9,200.00	$
⇨ 37	⇨ C20000	Norm Thompson	UPS Ground	08/19/2006	09/18/2006			Sales Manager	Open	54,537.00	8,280.00	$
⇨ 42	⇨ C50000	ADA Technologies	UPS Red	09/10/2006	10/10/2006			Bill Levine	Open	27,401.01	6,900.00	$
⇨ 59	⇨ C20000	Norm Thompson	UPS Ground	12/10/2006	01/09/2007			Sales Manager	Open	102,396.00	54,720.00	$
⇨ 89	⇨ C42000	Mashina Corporation	Fedex ON	05/15/2007	06/14/2007			Jim Boswick	Open	1,722.50	1,625.00	$
⇨ 110	⇨ C23900	Parameter Technology	Fedex EM	09/18/2007	10/18/2007			Brad Thompson	Open	588.30	555.00	$
⇨ 136	⇨ C40000	Earthshaker Corporation	Motor Express	02/15/2008	03/17/2008			Sophie Klogg	Open	851.57	781.25	$
⇨ 170	⇨ C50000	ADA Technologies	UPS Red	09/18/2008	10/18/2008			Bill Levine	Open	5,227.13	4,931.25	$
⇨ 202	⇨ C50000	ADA Technologies	UPS Red	03/20/2009	04/19/2009			Bill Levine	Open	10,600.00	10,000.00	$

24 Documents

Document Total 398,268.30 $
Value Total 176,786.25 $

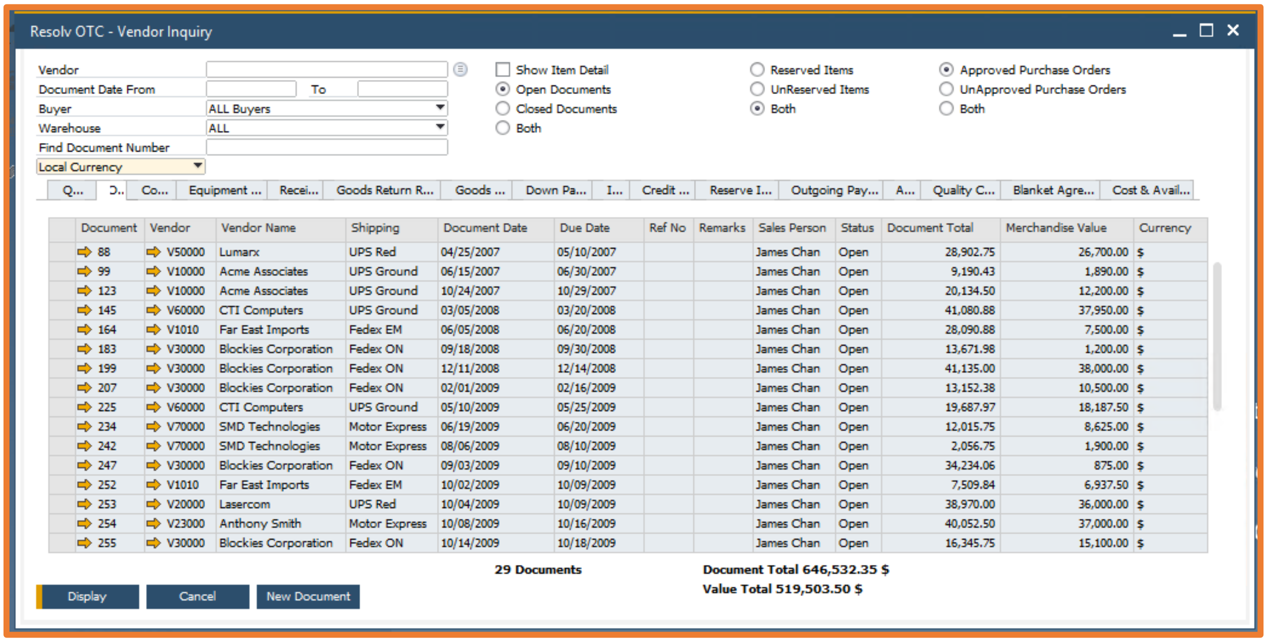
All Marketing Document views of the Customer Hub will allow the user to get both a count of the documents and a total of their Sales Value. This is useful to get a recap of how much business a customer has done over time, or Today's Sales, Today's Shipments, or Today's Cash. Salespeople can get insight into any quotes or opportunities that need their attention. Customer Service Representatives can quickly and easily find order history information.

Each of these functions is supported by the tabs, which load rapidly and without having to run multiple reports or go to different Modules in SAP Business One. The filters allow the data set to show different results, such as switching from Open to History, at the click of a button. Multiple filters can be used simultaneously. And when searching for a specific document, the Find option will highlight the row. In addition, Marketing Documents can be presented at the Document Header level, or the user can Show Item Detail, which will allow visibility to the transaction rows.

When the need arises, the user can also generate new transactions directly from the relevant OTC Customer Hub tab. This speeds up processing and data entry time by automatically populating the customer data. The ability to send customers copies of their orders, invoices or other documents is also a click away, even for multiple documents at the same time.

Resolv OTC – Vendor Hub

The Resolv OTC Vendor Hub offers an overview of all the SAP Documents and Activity that can be associated with Vendors. This inquiry has the same capabilities as the Customer Hub but is targeting uses that manage or work with inbound documents and vendor relationships.



Vendor
Document Date From To
Buyer: ALL Buyers
Warehouse: ALL
Find Document Number
Local Currency

☐ Show Item Detail
● Open Documents
○ Closed Documents
○ Both

○ Reserved Items
○ UnReserved Items
● Both

● Approved Purchase Orders
○ UnApproved Purchase Orders
○ Both

Document	Vendor	Vendor Name	Shipping	Document Date	Due Date	Ref No	Remarks	Sales Person	Status	Document Total	Merchandise Value	Currency
⇨ 88	⇨ V50000	Lumarx	UPS Red	04/25/2007	05/10/2007			James Chan	Open	28,902.75	26,700.00	$
⇨ 99	⇨ V10000	Acme Associates	UPS Ground	06/15/2007	06/30/2007			James Chan	Open	9,190.43	1,890.00	$
⇨ 123	⇨ V10000	Acme Associates	UPS Ground	10/24/2007	10/29/2007			James Chan	Open	20,134.50	12,200.00	$
⇨ 145	⇨ V60000	CTI Computers	UPS Ground	03/05/2008	03/20/2008			James Chan	Open	41,080.88	37,950.00	$
⇨ 164	⇨ V1010	Far East Imports	Fedex EM	06/05/2008	06/20/2008			James Chan	Open	28,090.88	7,500.00	$
⇨ 183	⇨ V30000	Blockies Corporation	Fedex ON	09/18/2008	09/30/2008			James Chan	Open	13,671.98	1,200.00	$
⇨ 199	⇨ V30000	Blockies Corporation	Fedex ON	12/11/2008	12/14/2008			James Chan	Open	41,135.00	38,000.00	$
⇨ 207	⇨ V30000	Blockies Corporation	Fedex ON	02/01/2009	02/16/2009			James Chan	Open	13,152.38	10,500.00	$
⇨ 225	⇨ V60000	CTI Computers	UPS Ground	05/10/2009	05/25/2009			James Chan	Open	19,687.97	18,187.50	$
⇨ 234	⇨ V70000	SMD Technologies	Motor Express	06/19/2009	06/20/2009			James Chan	Open	12,015.75	8,625.00	$
⇨ 242	⇨ V70000	SMD Technologies	Motor Express	08/06/2009	08/10/2009			James Chan	Open	2,056.75	1,900.00	$
⇨ 247	⇨ V30000	Blockies Corporation	Fedex ON	09/03/2009	09/10/2009			James Chan	Open	34,234.06	875.00	$
⇨ 252	⇨ V1010	Far East Imports	Fedex EM	10/02/2009	10/09/2009			James Chan	Open	7,509.84	6,937.50	$
⇨ 253	⇨ V20000	Lasercom	UPS Red	10/04/2009	10/09/2009			James Chan	Open	38,970.00	36,000.00	$
⇨ 254	⇨ V23000	Anthony Smith	Motor Express	10/08/2009	10/16/2009			James Chan	Open	40,052.50	37,000.00	$
⇨ 255	⇨ V30000	Blockies Corporation	Fedex ON	10/14/2009	10/18/2009			James Chan	Open	16,345.75	15,100.00	$

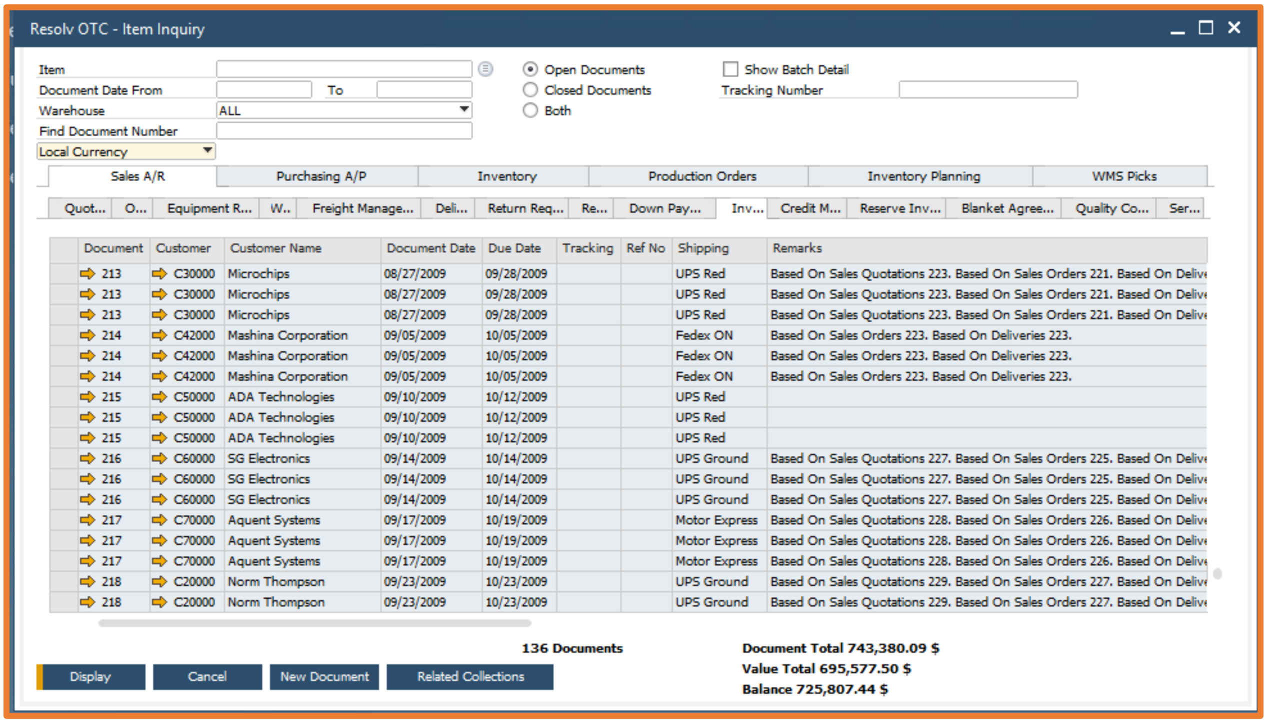
29 Documents

Document Total 646,532.35 $
Value Total 519,503.50 $

Utilizing OTC for this purpose allows complete visibility into common needs, such as payment history, historical purchase pricing, knowing about open Credit Memos when placing orders, and spend volume which can be useful in negotiations. Additionally, it becomes easier to manage the transactions, as the status of items on Containers, and seeing how much of an expected receipt is already reserved against demand documents.

Resolv OTC – Item Hub

The Resolv OTC Item Hub offers Procurement, Warehouse, and Logistics Managers with a centralized starting point to oversee all the inputs that impact their functions. This inquiry has the same capabilities as the Customer Hub but is organized with an Item centric view, rather than a Business Partner view. This provides more information as the functionality extends to both Sales and Purchasing, in addition to adding Inventory and Production data. However, the ability to filter by Business Partner or Salesperson is not used in this Inquiry.



Item
Document Date From To
Warehouse ALL
Find Document Number
Local Currency

● Open Documents
○ Closed Documents
○ Both

☐ Show Batch Detail
Tracking Number

Document	Customer	Customer Name	Document Date	Due Date	Tracking	Ref No	Shipping	Remarks
⇨ 213	⇨ C30000	Microchips	08/27/2009	09/28/2009			UPS Red	Based On Sales Quotations 223. Based On Sales Orders 221. Based On Delive
⇨ 213	⇨ C30000	Microchips	08/27/2009	09/28/2009			UPS Red	Based On Sales Quotations 223. Based On Sales Orders 221. Based On Delive
⇨ 213	⇨ C30000	Microchips	08/27/2009	09/28/2009			UPS Red	Based On Sales Quotations 223. Based On Sales Orders 221. Based On Delive
⇨ 214	⇨ C42000	Mashina Corporation	09/05/2009	10/05/2009			Fedex ON	Based On Sales Orders 223. Based On Deliveries 223.
⇨ 214	⇨ C42000	Mashina Corporation	09/05/2009	10/05/2009			Fedex ON	Based On Sales Orders 223. Based On Deliveries 223.
⇨ 214	⇨ C42000	Mashina Corporation	09/05/2009	10/05/2009			Fedex ON	Based On Sales Orders 223. Based On Deliveries 223.
⇨ 215	⇨ C50000	ADA Technologies	09/10/2009	10/12/2009			UPS Red	
⇨ 215	⇨ C50000	ADA Technologies	09/10/2009	10/12/2009			UPS Red	
⇨ 215	⇨ C50000	ADA Technologies	09/10/2009	10/12/2009			UPS Red	
⇨ 216	⇨ C60000	SG Electronics	09/14/2009	10/14/2009			UPS Ground	Based On Sales Quotations 227. Based On Sales Orders 225. Based On Delive
⇨ 216	⇨ C60000	SG Electronics	09/14/2009	10/14/2009			UPS Ground	Based On Sales Quotations 227. Based On Sales Orders 225. Based On Delive
⇨ 216	⇨ C60000	SG Electronics	09/14/2009	10/14/2009			UPS Ground	Based On Sales Quotations 227. Based On Sales Orders 225. Based On Delive
⇨ 217	⇨ C70000	Aquent Systems	09/17/2009	10/19/2009			Motor Express	Based On Sales Quotations 228. Based On Sales Orders 226. Based On Delive
⇨ 217	⇨ C70000	Aquent Systems	09/17/2009	10/19/2009			Motor Express	Based On Sales Quotations 228. Based On Sales Orders 226. Based On Delive
⇨ 217	⇨ C70000	Aquent Systems	09/17/2009	10/19/2009			Motor Express	Based On Sales Quotations 228. Based On Sales Orders 226. Based On Delive
⇨ 218	⇨ C20000	Norm Thompson	09/23/2009	10/23/2009			UPS Ground	Based On Sales Quotations 229. Based On Sales Orders 227. Based On Delive
⇨ 218	⇨ C20000	Norm Thompson	09/23/2009	10/23/2009			UPS Ground	Based On Sales Quotations 229. Based On Sales Orders 227. Based On Delive

136 Documents

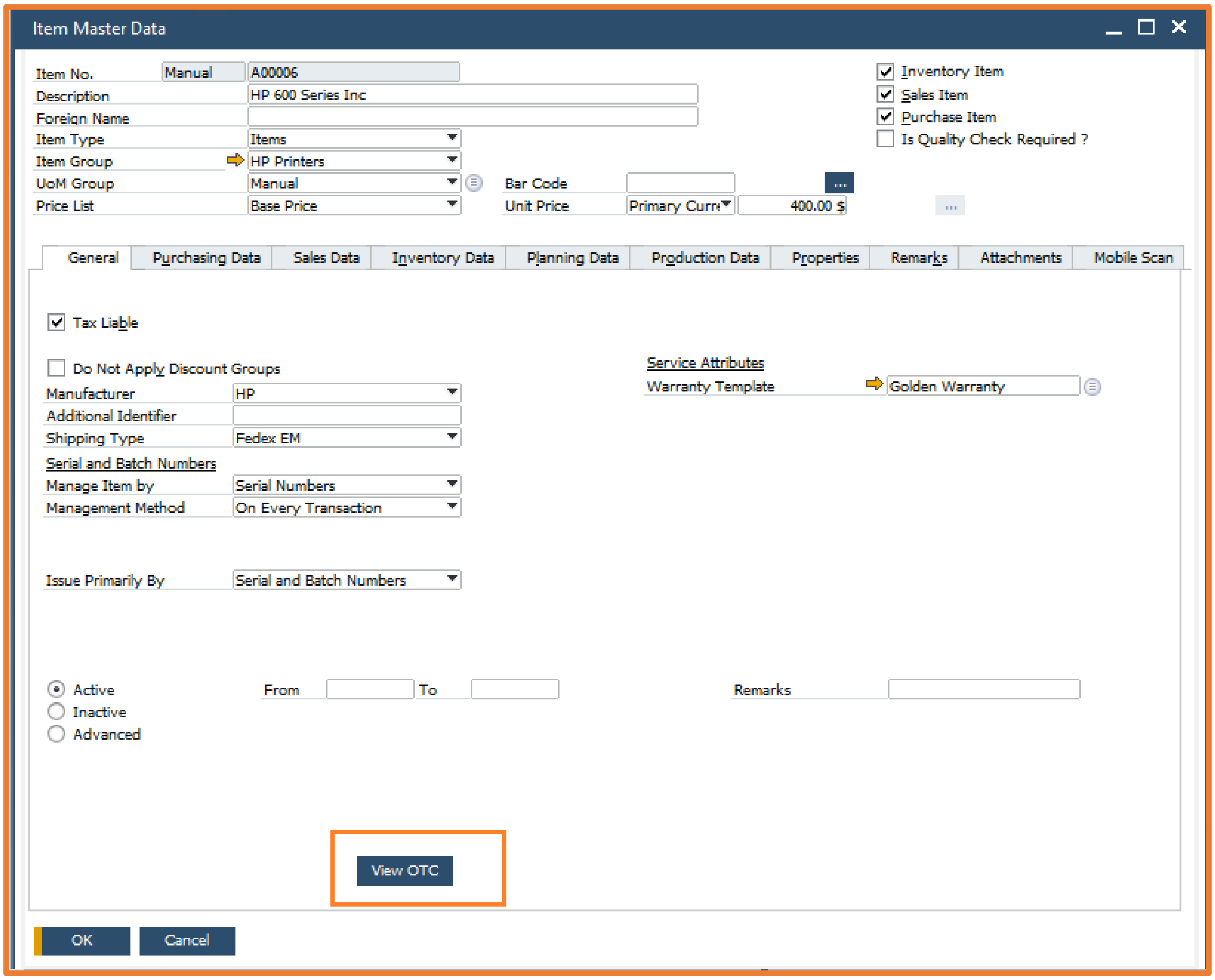
Document Total 743,380.09 $
Value Total 695,577.50 $
Balance 725,807.44 $

Accessing OTC Directly from Master Data

In addition to the main menu options, it is often convenient to open the Operations Transaction Center inquires directly from a Master Data record on which you want more information. When utilizing the methods shown below, OTC will automatically apply an appropriate filter based on the record the window was launched from, such as the Item Number.

Item Master Data

To open the OTC – Item Hub from an Item Master, simply click on the View OTC button.

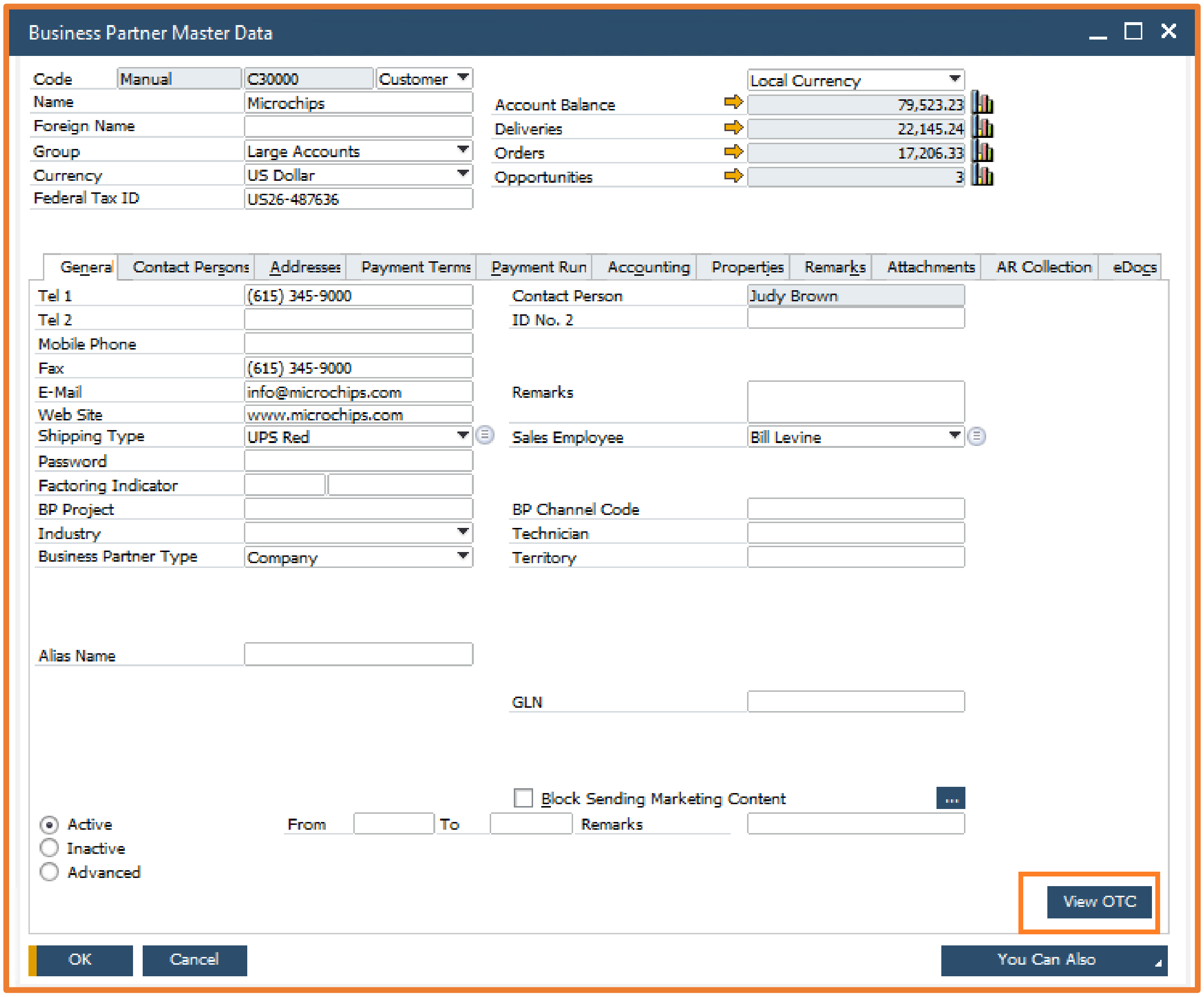


Item No. Manual A00006
Description HP 600 Series Inc
Foreign Name
Item Type Items
Item Group HP Printers
UoM Group Manual
Price List Base Price
Bar Code
Unit Price Primary Curr 400.00 $
☑ Inventory Item
☑ Sales Item
☑ Purchase Item
☐ Is Quality Check Required ?

☑ Tax Liable
☐ Do Not Apply Discount Groups
Manufacturer HP
Additional Identifier
Shipping Type Fedex EM
Serial and Batch Numbers
Manage Item by Serial Numbers
Management Method On Every Transaction
Issue Primarily By Serial and Batch Numbers
Service Attributes
Warranty Template Golden Warranty
● Active
○ Inactive
○ Advanced
From To
Remarks

Business Partner Master Data

To open the OTC – Customer Hub or the OTC – Vendor Hub from the Business Partner Master, simply click on the View OTC button on the bottom right of the screen. The appropriate OTC screen will be launched depending on the Business Partner Master type; Customer or Vendor.



Business Partner Master Data

Code: Manual | C30000 | Customer
Name: Microchips
Group: Large Accounts
Currency: US Dollar
Federal Tax ID: US26-487636

Local Currency
Account Balance: 79,523.23
Deliveries: 22,145.24
Orders: 17,206.33
Opportunities: 3

Tel 1: (615) 345-9000
Fax: (615) 345-9000
E-Mail: info@microchips.com
Web Site: www.microchips.com
Shipping Type: UPS Red
Business Partner Type: Company

Contact Person: Judy Brown
Sales Employee: Bill Levine

☐ Block Sending Marketing Content

● Active
○ Inactive
○ Advanced

Resolv Module Integration

Resolv Operations Transaction Center is integrated with several other Resolv modules. This integration ensures that the OTC screens provide complete information relevant to the modules implemented. Please note that if the modules are not licensed and enabled, the functionality for these modules will not appear. The following Modules are currently supported.

AR Collections

The ***Resolv AR Collections Management*** module provides enhanced functionality that is fully integrated into SAP Business One. Credit managers and collections staff are provided with a one-screen dashboard to view all relevant credit information for each customer. A complete history of credit calls may be tracked and reviewed on-screen. Multiple documents may be referenced and attached to the collection history. Other tools include the ability to print, fax, or email documents to preset destinations for each customer; and a credit approval screen for sales orders on hold. Reports are provided to summarize and display history and forecasts.

Container Management

The ***Resolv Container Management*** module can help track the contents of containers, their estimated and actual shipment dates, statuses and their costs. It integrates completely with SAP Business One Purchase Orders, Goods Receipt PO's, and Landed Costs. It provides all the data you need to stay informed at all stages of the shipment. Reports by shipment status are also included.

Data Messenger

The ***Resolv Data Messenger*** module provides the ability to preset destinations for documents that are sent to business partners. You may choose from the following methods of routing documents:

- Fax
- Email
- Internal Message
- Print

EDI

The ***Resolv EDI Control*** module provides enhanced functionality that is fully integrated into SAP Business One. EDI administrators can create and manage trading partners, automate the creation of both SAP documents and EDI documents, and ensure that process and procedures are followed such that successful communication with different trading partners can be accomplished, even with their varied requirements.

Operations Analysis

Summary of features:

- *Zero Setup or Configuration required*
- *Management focused Operations Analysis Inquiry*
    - Instant access to profitability and trend drivers
    - Rapid analysis for performance by customer, manufacturer, Salespeople, Item Categories and more

Glossary of Terms and Documents

Since the use of the ***Resolv Operations Analysis*** functionality encompasses many features from SAP Business One and the enhancements provided by the other modules in the Resolv suite, it can be helpful to understand what data is available and what the filters are based upon. This section provides a glossary that can be used to reference the underlying SAP and Resolv functions, as well as provide a comprehensive overview of what can be accessed via ***Resolv Operations Analysis***.

Customer	This filter is a condition that can be used to limit the results within Operations Analysis. This utilizes the 'CardCode' field on the document header (Customer field on the header). The filter criteria is a "choose from" list that is populated by the values in the BP Master Data table OCRD filtered to the Customer type. When left blank, it does not filter the results. There is also a Customer tab in Operations Analysis. Within this tab there are multiple sub tabs offering analysis where the Customer is used as a grouping/summarizing field rather than a filter field.
Customer Category	This filter field is a condition that can be used to limit the results within Customer, Item and Salesperson tabs of the Operations Analysis. The filter is using the value for Customer's 'GroupCode' as currently defined on the BP Master when the transaction is linked to a customer. The valid values are derived from the OCRG table for Customer Groups. Also added is an "ALL Customer Categories" which returns an unfiltered result set.

	For more information about Customer Groups, please refer to the SAP Help page for Defining Customer and Vendor Groups.
Date From and To	This filter can be used to limit the results within Operations Transaction Center. This utilizes the Document Date field on the document header. The filter criteria uses the standard SAP Business One date entry. The user can enter a “From” date and a “To” date. Either or both of these dates can be left blank indicating there is no filtering on that criteria. The default entry for the “From” date will be the first day of the year (ex 01/01/2020) and the default “To” date will be the current date.
Item Code	This filter is a condition that can be used to limit the results within Operations Analysis. This utilizes the ‘Item’ field on the document header. The filter criteria is a “choose from” list that is populated by the values in the Item Master Data table. There is also an Item tab in Operations Analysis. Within this tab there are multiple sub tabs offering analysis where the Item is used as a grouping/summarizing field rather than a filter field.
Item Category	This filter field is a condition that can be used to limit the results within all tabs of Operations Analysis. The filter is using the value for Item’s ‘ItmsGrpCod’ as currently defined on the Item Master for the Items link to the transactions. The valid values are derived from the OITB table for Item Groups and added is an ALL Item Categories, which returns an unfiltered result set. For more information about Item Groups, please refer to the SAP Help page for Item Groups Setup.
Item Group	See **Item Category**
Manufacturer	This filter field is a condition that can be used to limit the results within all tabs of Operations Analysis. The filter is using the value for Item’s ‘FirmCode’ as currently defined on the Item Master for the Items link to the transactions.

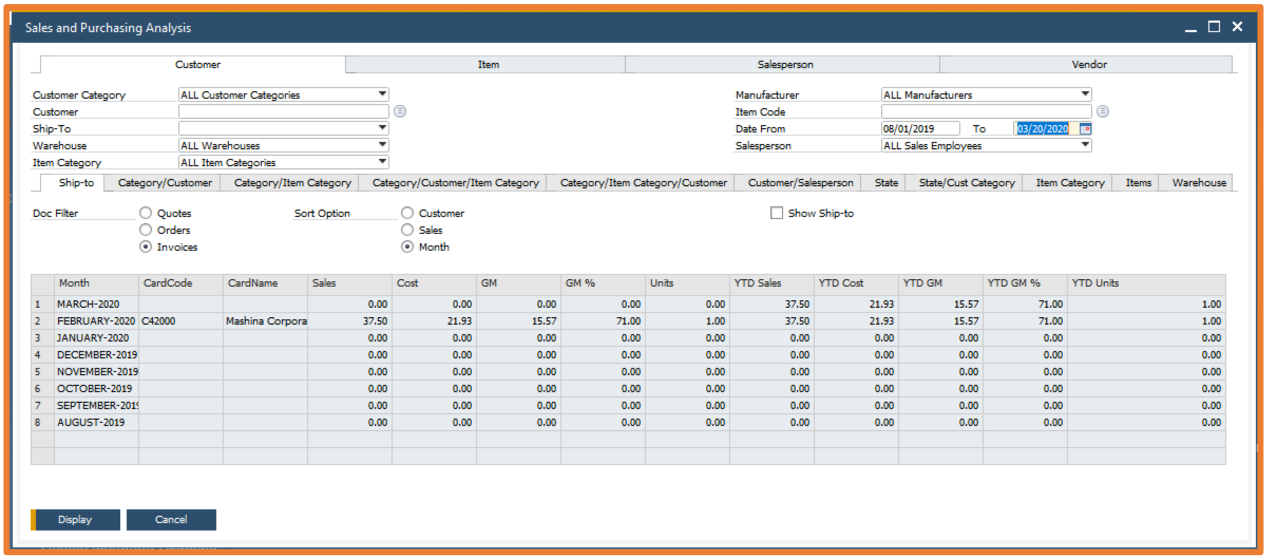
	The valid values are derived from the OMRC table for Manufacturer. Also added is an “ALL Manufacturers” which returns an unfiltered result set. For more information about Manufacturers, please refer to the SAP Help page for Manufacturers Setup.
Price List	This filter field is a condition that can be used to limit the results within the Price & Availability tab. The filter is using the values from the standard SAP Price List selection.
Salesperson	This filter is a condition that can be used to limit the results within all the tabs of Operations Analysis. This utilizes the ‘SlpCode’ field on the document header (Salesperson field on the header). The filter criteria is a “choose from” list that is populated by the values in the Salesperson table OSLP. Also, a value is added for “All Sales Employees” which does not filter the results. There is also a Salesperson tab in Operations Analysis. Within this tab there are multiple sub tab offering analysis where the salesperson is used as a grouping/summarizing field rather than a filter field.
Ship To	This filter is a condition that can be used to limit the results within Operations Analysis. This utilizes the ‘ShipToCode’ field on the document header (Ship To field on the header). The filter criteria is a “choose from” list that is populated by the values in the Addresses table CRD1 related to the Customer selected in the customer filter. When left blank, it does not filter the results. There is also a Ship To sub-tab in Operations Analysis offering analysis where the ship to is used as a grouping/summarizing field rather than a filter field.
State	This filter is a condition that can be used to limit the results within Operations Analysis. This utilizes the ‘StateS’ field on the address extension for the document header. If the field is null, then the ‘State’ field from the Ship To (CRD1) table will be used. The filter criteria is a “choose from” list that is populated by the values in the States table (OCST). Also, a value is added for All States which does not filter the results.

	There are also State sub-tabs in Operations Analysis. Within these tabs the States are used to offer analysis where the state is used as a grouping/summarizing field rather than a filter field.
Vendor	This filter is a condition that can be used to limit the results within Operations Analysis. This utilizes the ‘CardCode’ field on the document header (Vendor field on the header). The filter criteria is a “choose from” list that is populated by the values in the BP Master Data table OCRD filtered to the Vendor (Supplier) type. When left blank, it does not filter the results. There is also a Vendor tab in Operations Analysis. Within this tab there are multiple sub tab offering analysis where the Vendor to is used as a grouping/summarizing field rather than a filter field.
Vendor Category	This filter field is a condition that can be used to limit the results within the Vendor tab of the Operations Analysis. The filter is using the value for Vendor’s ‘GroupCode’ as currently defined on the BP Master when the transaction is linked to a Vendor. The valid values are derived from the Vendor Groups and also added is an ALL Vendor Categories, which returns an unfiltered result set. For more information about Customer Groups, please refer to the SAP Help page for Defining Customer and Vendor Groups.
Warehouse	This filter is a condition that can be used to limit the results within Operations Analysis. This utilizes the ‘Whse’ field on the document rows. The filter criteria is a “choose from” list that is populated by the values in the Warehouse table (OWHS). Also, a value is added for “All Warehouses” which does not filter the results. There are also Warehouse sub-tabs in Operations Analysis. Within these tabs the Warehouses are used to offer analysis where the state is used as a grouping/summarizing field rather than a filter field.

Resolv Operations Analysis

The Operations Analysis is differentiated from the Customer, Vendor, and Item Inquires in that it is only an analytic tool. The data contained in this option is summarized and does not show the individual transactions.

The data can be filtered to quick give insight into Sales, Costs, Profitability and trends over time. This can be very broad, covering the entire operations of the company or can be narrowed to lower levels such as the specific performance of a Salesperson by Manufacturer in a given state by Item Category.



Customer Category: ALL Customer Categories
Customer:
Ship-To:
Warehouse: ALL Warehouses
Item Category: ALL Item Categories

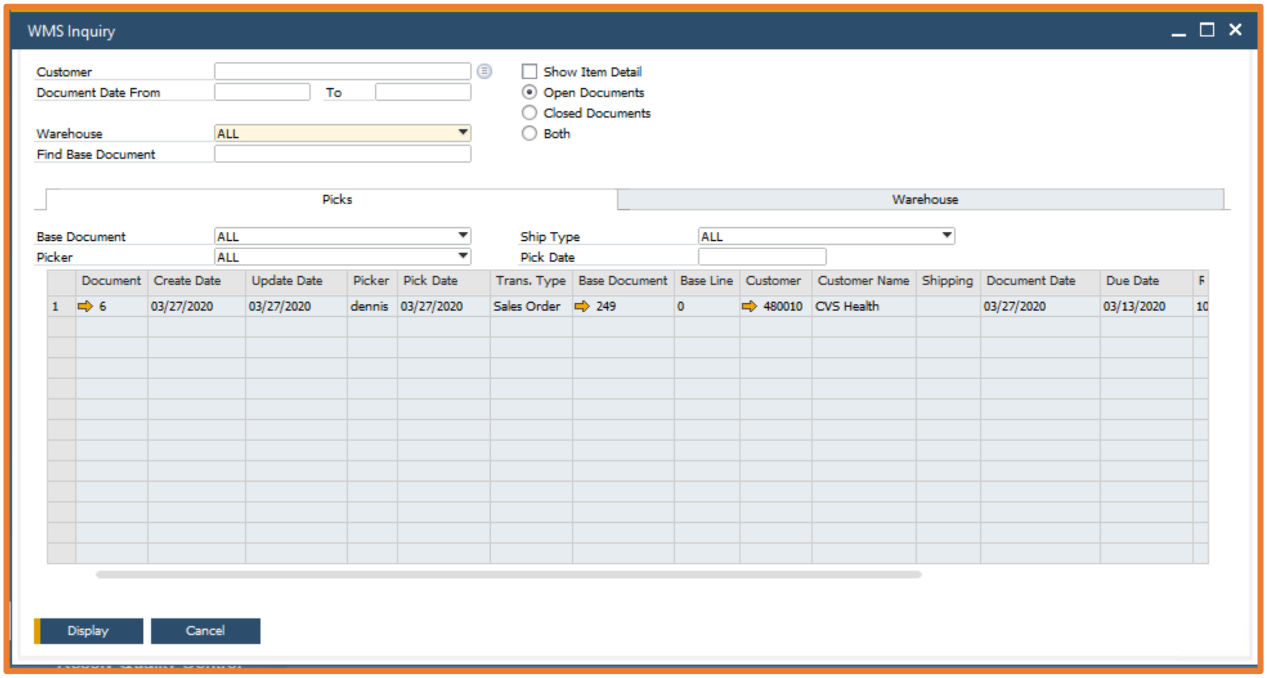
Manufacturer: ALL Manufacturers
Item Code:
Date From: 08/01/2019 To 03/20/2020
Salesperson: ALL Sales Employees

Doc Filter: ○ Quotes ○ Orders ● Invoices
Sort Option: ○ Customer ○ Sales ● Month
☐ Show Ship-to

	Month	CardCode	CardName	Sales	Cost	GM	GM %	Units	YTD Sales	YTD Cost	YTD GM	YTD GM %	YTD Units
1	MARCH-2020			0.00	0.00	0.00	0.00	0.00	37.50	21.93	15.57	71.00	1.00
2	FEBRUARY-2020	C42000	Mashina Corpora	37.50	21.93	15.57	71.00	1.00	37.50	21.93	15.57	71.00	1.00
3	JANUARY-2020			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4	DECEMBER-2019			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5	NOVEMBER-2019			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
6	OCTOBER-2019			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
7	SEPTEMBER-201			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
8	AUGUST-2019			0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

WMS Hub

The data can be filtered to quick give insight into Pick lists, who is logged into the WMS system and the different bins utilized in the system.



Customer
Document Date From   To
Warehouse ALL
Find Base Document

☐ Show Item Detail
● Open Documents
○ Closed Documents
○ Both

Base Document ALL
Picker ALL
Ship Type ALL
Pick Date

	Document	Create Date	Update Date	Picker	Pick Date	Trans. Type	Base Document	Base Line	Customer	Customer Name	Shipping	Document Date	Due Date	F
1	⇨ 6	03/27/2020	03/27/2020	dennis	03/27/2020	Sales Order	⇨ 249	0	⇨ 480010	CVS Health		03/27/2020	03/13/2020	10