Order Summary Transaction

FAQ’s and Help

What does this transaction allow me to do?
The Order Summary application displays customer order information such as the Customer PO Number, Order Date, Order Status, Hubbell Sales Order Document Number, Last Ship Date and Last Ship Carrier. It also allows you to link to Carrier Tracking websites for reviewing the status of shipments. The orders which are displayed can be filtered by date range.

How will order information be displayed?
By default, orders should be displayed by most recent to oldest with a maximum of 10 order summaries displayed in a single view.

How does the search filtering work?
The orders which are displayed can be filtered by date range or Manufacturer Item Number.

If you enter a search which returns a single sales order match, then the Sales Order Detail screen is displayed for that item.
Searching for Orders

Screen 1: Order Summary Screen
This is the first screen that appears after clicking the “Order Summary” link in the portal.

1) PO No
If you have a particular Purchase Order, you can enter it here. If only one sales order matches this Purchase Order Number, then it is displayed in the Sales Order Detail when you press Enter or the Search button. If more that one sales order applies, the system shows all sales orders that match and you select the correct sales order from the list.

2) Sales Order No
If you have a particular Sales Order in mind, you can enter it here and press Enter or the Search button. The system will display the Sales Order Detail.

3) Account
You may enter an account number associated with the orders you want to look up. Initially this will be filled in with the first default account. If you are unsure of the account you wish to search on, you can click the “Acct List” button which takes you to a customer account selection screen. (See screen 1a)

4) Mfr Item No / Catalog No
You may enter a manufacturer item number here to find all orders that have this item in any of their line items. Press Enter or the Search button. The date range also applies to this search.

5) Date Range
This will narrow the search results to Orders that have taken place between the from and to dates. The default selection is for the last thirty days. You cannot enter a date range any wider than 180 days.

6) Search Button
Press the Search button after you have entered any of the above fields. You can enter only one of Sales Order No, PO No, Mfr item No. If only one order matches, the Sales Order Detail is shown, otherwise for Date/Item/Account searches, the list of matching orders is shown (See screen 1b).

7) Clear Button
Press this button to clear the search input fields and results and start from the beginning.
8) Search all accounts
Select this checkbox to search orders for all your authorized accounts. To expedite search, Last Ship Date and Ship-To City, State columns are suppressed when this option is selected. Note: This feature is available to select Hubbell divisions only.

9) Search by Your Item No.
Select this checkbox to search orders by customer’s cross reference number. Note: This feature is available to select Hubbell divisions only.
Screen 1a: The Account Selection Screen

This screen is produced when the Acct List button is pressed. It produces a list of accounts linked to your user id. If there is an account that is not listed that should be there, you should contact support.

1) Account Selection
Click the box to the left of the row to make a selection and return.

2) Page Jump
If the number of records is too large to fit in the screen, you can use arrow buttons to jump to the next or previous page of results. You can also enter a row number and Enter to jump to a row.

3) Search button
If you want to filter the list displayed, enter any combination of Account #, Customer Name, City and press the Search Button. The smaller list is displayed.
Screen 1b: The Order Summary Screen with results.

Pressing the Search button as specified in screen 1 may result in output in the lower portion of the screen. If no records are found, you should change the search criteria and try again. Otherwise, the results will look similar to this:

1) **Order Selection**
   To view the Sales Order Details for a record, click the box to the left of the row.

2) **Page Jump**
   If the number of records is too large to fit in the screen, you can use arrow buttons to jump to the next or previous page of results. You can also enter a row number and Enter to jump to a row.

**Field Definitions**

**PO No:**
The purchase order number created by the customer.

**PO Release:**
The purchase order number release number.
PO Type:
Type of the purchase order as EINT – Internet order, EEDS,EEDI – EDI order, Empty – Manual customer service entered.

Order Date:
The date the order was entered into Hubbell’s system, regardless of the order being entered by phone, fax, EDI, or on-line.

Sales Order No:
Sales order number generated internally by the system.

Order Value:
Total net value of the order. Not shown if you cannot see pricing due to differences with agents.

Last Ship Date:
The last date that goods from this order were shipped.

Order Status:
The status of the order may be Open, Partial or Complete. An open order is one that has not yet begun shipping. A partial order is one that has begun shipping but not completely shipped. A complete order is one that has fully shipped.

Block Status:
Blocked status of the order as Blocked(33) – Customer credit hold, Blocked – System blocked and call customer service or order is pending review, Empty – Not blocked.
Sales Order Detail

Screen 2a: Sales Order Detail Screen

The Order Detail screen provides detailed information about the order that was selected from the Order Summary Screen. The Account Number, Sales Order Number, PO Number, PO Release Number, Order Received Date, Sold To Address, Ship To Address, Bill To Address is shown for the whole order as well as details for items, delivery details, billing documents, or notes/ship instructions in tabs. Initially the Delivery details are shown as below.

1) Previous Screen Button
Press the Previous Screen button to return to the Order Summary screen.

2) View Order Acknowledgement
Press this to request generation of a printed Sales Order Acknowledgement document. A download link is shown which you then press. A new window is shown so you can view, save, or email the document. Not available if you are not allowed to see pricing.

3) Printer friendly view
Check this to change the Delivery Details list to show all delivery documents for printout (across all pages). You can then print using your browser print option. Uncheck to return to the default 10 items per page.

Screen 2a – Sales Order Detail with Delivery Details
Delivery Details Field Definitions

**Line Item**
A sequential number indicating the line item in this order.

**Mfr Item Number**
This identifies the Catalog number or Material number.

**Ordered**
Quantity of this item originally ordered.

**Shipped**
For shipped items, the quantity of this item that was shipped on the given Ship Date. There may be more than one shipment of an item. If there are remaining quantities not shipped, this is shown on a separate line with parenthesis around the quantity and the Est Ship Date is shown instead. (See third line in example screen above)

**Est Ship Date**
For unshipped items, the estimated ship date is shown instead of the (actual) Ship Date. (See third line in example screen above)

**Req Date**
The originally requested ship date is shown for comparison purposes.

**Ship Date**
For shipped items, the actual ship date is shown on a separate line if needed, with the shipped quantity in Shipped.

**Item Tracking/Pro No**
For shipped items, there may be a link here to the Carrier website / URL. This will open up a window for the Carrier with tracking information for the shipped item. (not all carriers have this capability). Hubbell provides this link as a courtesy and does not warrant or guarantee accuracy of any third party content.

**Shipped From**
Location that the item has been or will be shipped from.

**Freight Carrier**
For shipped items, the shipping company actually used for delivery of that item to the customer. For unshipped items, the requested carrier.
Screen 2b: Item Details Tab

The Line Item Tab provides detailed information about each line item in the order as below:

### Item Details Field Definitions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Line Item</strong></td>
<td>A sequential number indicating the line item on this order. Note that rejected items are not displayed.</td>
</tr>
<tr>
<td><strong>Mfr Item Number/ Mfr Item Description</strong></td>
<td>This identifies the Catalog number or Material number with a description.</td>
</tr>
<tr>
<td><strong>UPC</strong></td>
<td>Universal Product Code for the Mfr. Item Number. Not all items have a UPC associated with them.</td>
</tr>
<tr>
<td><strong>Ordered/Released/Shipped</strong></td>
<td>Quantity of this item originally ordered, released for warehouse selection, and shipped.</td>
</tr>
<tr>
<td><strong>Rejected</strong></td>
<td>Rejection code if this item was rejected. A description is displayed below for each rejection code.</td>
</tr>
<tr>
<td><strong>Est Ship Date</strong></td>
<td>The estimated ship date for this item. Always displayed for comparison even after the item is completely shipped.</td>
</tr>
</tbody>
</table>
Quote
If line item was referenced to a quote, the quotation number is shown.

Gross Weight
Gross weight for each line item.

Unit Price
Unit price for each line item.

Ext Price
Extended price (unit price times quantity) for each line item.
Screen 2c: Billing Documents Tab

The details for all billing documents for the order are shown as below:

**Billing Documents Details Field Definitions**

**Doc Number/Description**
Identifying document number and description of the billing document.

**Issue Date**
Issue date for the billing document.

**Viewable**
Availability of a printable version for the billing document. “Yes” if viewable or empty if not.

1) **View Billing Document button**
Press to view or print the currently selected viewable billing document. A download link is shown which you then press. A new window appears and you can view, save, or print the document. Not available if you are not allowed to see prices.

2) **Email Billing Document button**
Enter the Email Address then press this to email the currently selected viewable billing document.
Screen 2d: Notes/Ship Instruct Details Tab

The Notes/Ship Instruct Tab provides header notes and shipping instructions for the entire order as below:

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**Sales Order Details**

- **Account Number**: 10487120
- **Sales Order Number**: 10487120
- **PO Number**: 4502662160
- **PO Rel. Number**: 10487120
- **Order Received Date**: 1/24/2008

**Sold To**: GRAYBAR
2001 SUPERIOR ST
ST LOUIS 63103
US

**Ship To**: API ELECTRIC
5378 HWY 110
ST LOUIS 63177
US

**Bill To**: GRAYBAR
SAINT LOUIS (IND CIN 63178
US

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**Delivery Details**

**Item Details**

**Billing Documents**

**Notes/Ship Instruct**

**Header Notes**

MARX 21447-46357
CHG SHIP DATE TO 3/13 PO

**Shipping Instructions**

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Screen 2d– Sales Order Detail with Notes/Ship Instruct Details