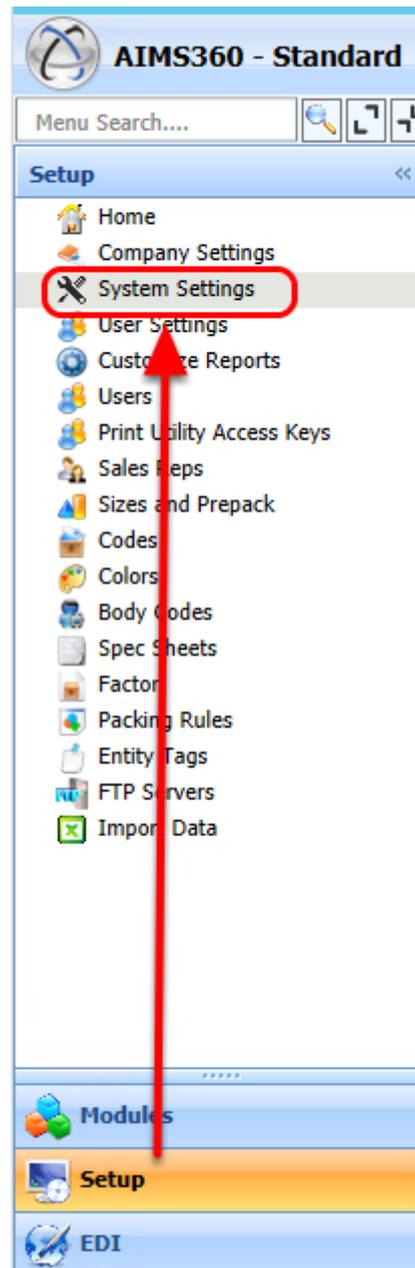


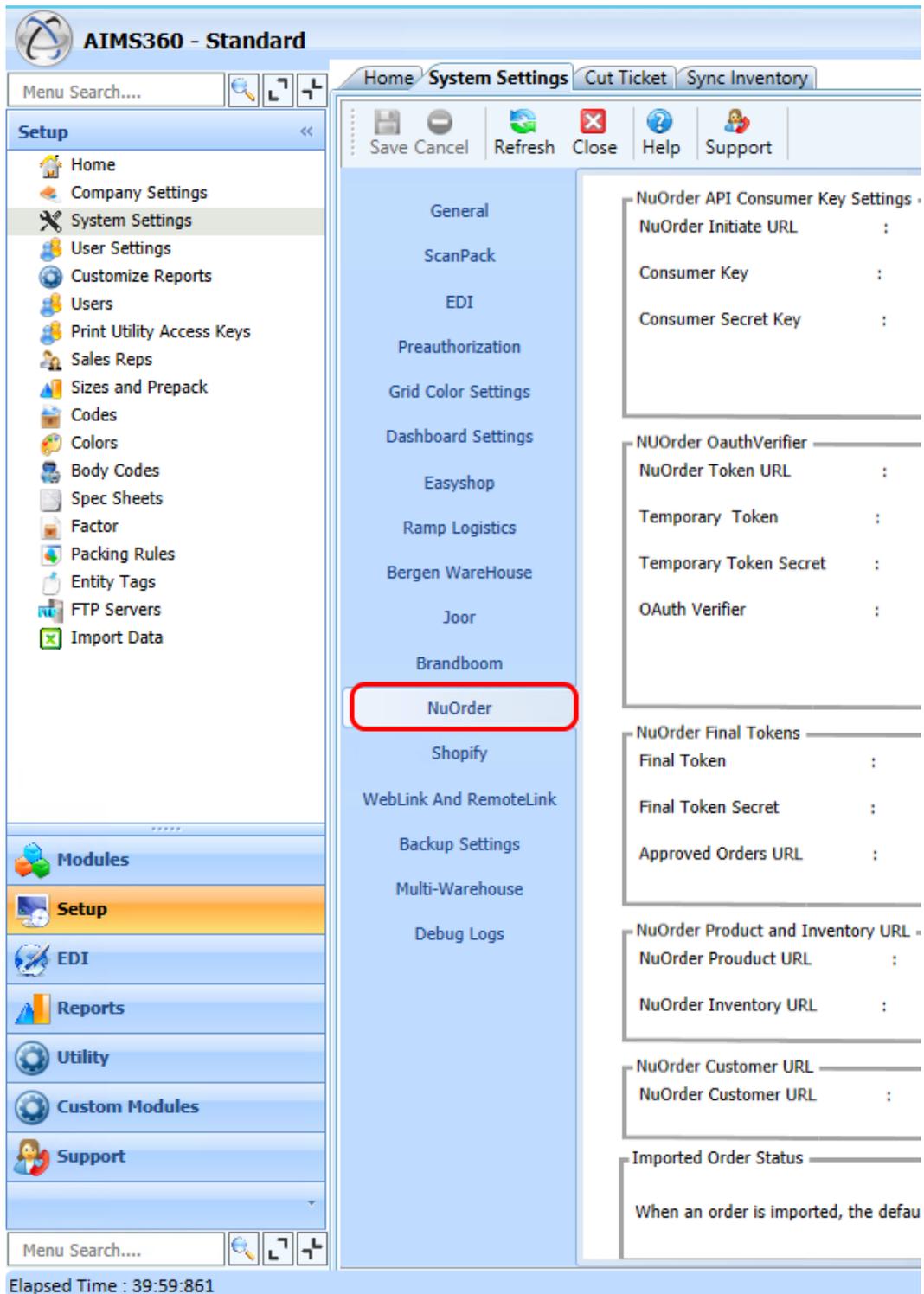
# NuOrder - Sync Inventory System Settings

There are a few settings in the system settings area that help determine how you want your OTS for NuOrder to display.

## 1. Launch the System Settings module



## 2. Goto the NuOrder Tab



## 3. Review the OTS settings on the right side of the screen

With the selection as set below, we are including Stock, WIP, Less any Orders in AIMS.

This screen shot also shows Multi Warehouse is active so you can select to sync with a specific warehouse or all.

**NOTE:** If you use Weblink, you may wish to turn on the Weborders option as well.

The screenshot displays the NuOrder Sync Inventory System Settings form, organized into several sections:

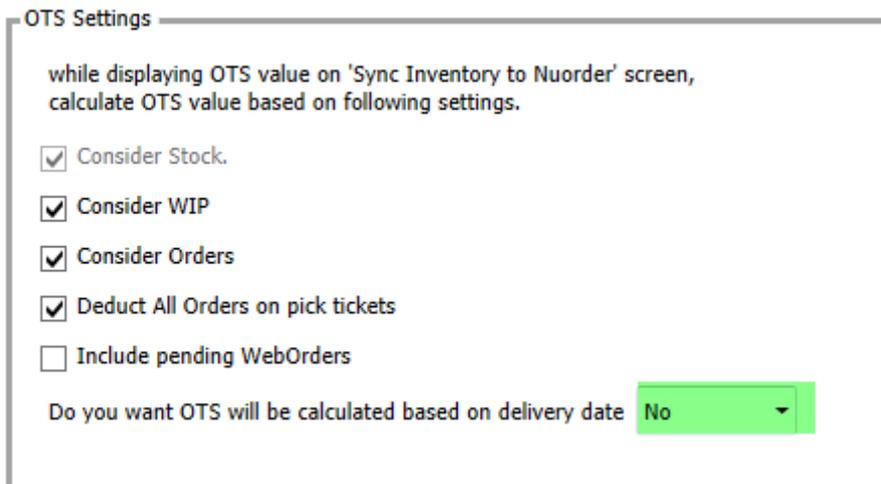
- NuOrder API Consumer Key Settings:** Includes fields for NuOrder Initiate URL, Consumer Key, and Consumer Secret Key, with a "Generate Verify Token" button.
- NuOrder Oauth/Verifier:** Includes fields for NuOrder Token URL, Temporary Token, Temporary Token Secret, and OAuth Verifier, with a "Get Final Credentials" button.
- NuOrder Final Tokens:** Includes fields for Final Token, Final Token Secret, and Approved Orders URL.
- NuOrder Product and Inventory URL:** Includes fields for NuOrder Product URL and NuOrder Inventory URL.
- NuOrder Customer URL:** Includes a field for NuOrder Customer URL.
- Imported Order Status:** Includes a dropdown menu for "When an order is imported, the default order status should be:" set to "OPEN".
- Imported Order Address Consider From:** Includes a dropdown menu for "When an Order is imported, the default order address from:" set to "Option 3".
- NuOrder Individual Order URL:** Includes a field for "NuOrder Individual Order URL:".
- Sync Inventory Settings:** Includes radio buttons for "OTS" (selected) and "Immediate Stock / WIP Details".
- OTS Settings:** A green highlighted box containing instructions: "while displaying OTS value on 'Sync Inventory to Nuorder' screen, calculate OTS value based on following settings." It includes checkboxes for "Consider Stock", "Consider WIP", "Consider Orders", "Deduct All Orders on pick tickets", and "Include pending WebOrders". A dropdown menu for "Do you want OTS will be calculated based on delivery date" is set to "No".
- Select warehouse(s):** Includes a section for "While sending inventory information to Nuorder consider following warehouse:" with radio buttons for "All warehouse" and "Selected warehouse(s)" (selected). It features "Tag All" and "Un Tag All" buttons and a list of warehouses: "TRAINING DEMO" (unchecked) and "RETAIL (VIRTUAL)" (checked).

## Selecting OTS

This close-up view shows the "Sync Inventory Settings" section of the form. It features two radio buttons: "OTS" (which is selected) and "Immediate Stock / WIP Details".

## 4. OTS without OTS by date activated

If you do not use the OTS by date option, then the system simply looks at every Order and WIP in your system from the current date to the end of time to calculate OTS.



### 4.1 Example of OTS without by date calculation

Since there is no date selection now, the system simply looks at all data to provide OTS.

Stock, + WIP (Any dates), - Orders (Any dates) = OTS

Select	Aims Style	Aims Color	Aims Color Description	Aims Size Description	Aims Stock	WIP Stock	Order Stock	Picked Stock	Weborder Stock	OTS Stock	NuOrder Stock	Stock Moving
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	XS	80	4	4	0	0	80	44	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	S	62	8	8	0	0	62	38	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	M	61	8	8	0	0	61	38	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	L	81	4	4	0	0	81	44	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	XL	100	0	0	0	0	100	50	0

## 5. OTS Date Calculation option

You have the ability to turn on the OTS by Date calculation option, and can even set a desired number of days into the future for the system to use by default. In this case I have it set to Zero to only include the **specific day** I am reviewing. However, by adding a number of days you can see what your OTS will be from today through X number of days.

**IMPORTANT:** it is important to note that AIMS360 only considered the Completion date on your customer orders to calculate OTS.

so the default OTS formula when you are not considering a specific date = Stock + WIP - Orders (as noted in Step 4 above)

which breaks out to mean:

- Stock (as of today)
- WIP (all open WIP for all dates)
- Orders (all open or hold orders in your system regardless of Date)

### OTS Settings

while displaying OTS value on 'Sync Inventory to Nuorder' screen, calculate OTS value based on following settings.

- Consider Stock.
- Consider WIP
- Consider Orders
- Deduct All Orders on pick tickets
- Include pending WebOrders

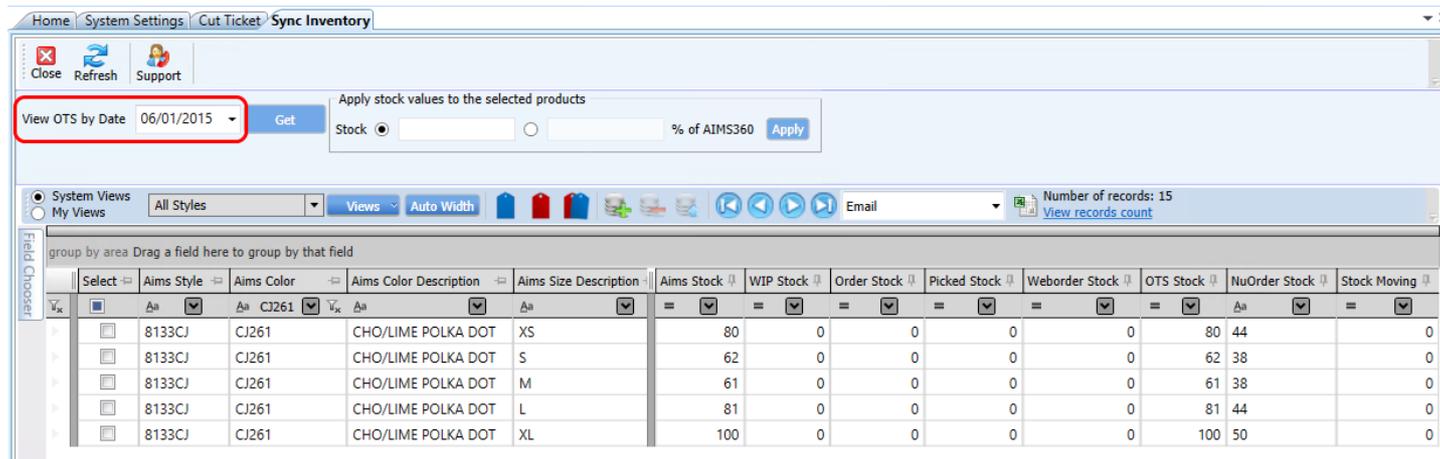
Do you want OTS will be calculated based on delivery date Yes ▾

View OTS By Date: 6/1/2015 11:19:11 AM +  days

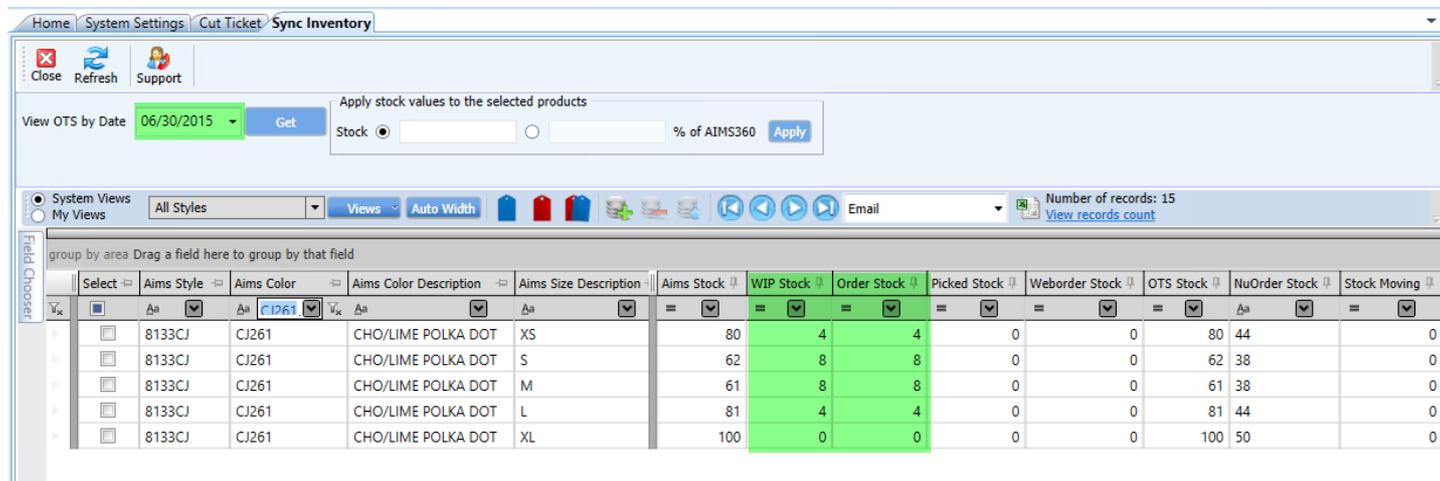
### 5.1 Example of OTS by Date

In the inventory Sync screen I have a new style selected that has Orders in the system for the end of this month. There is also WIP due in at the end of the month as well.

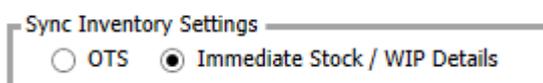
But with the OTS calculated by date option, I'm asking to see what is happening in my system as of today! So as of TODAY, I show no orders, no WIP and my OTS is displayed properly for today's date only..



If we change the Date to the end of the month, we will see the orders and WIP reflected as the system is looking at the completion date on the orders or WIP and will only show them in the system on or after that date if selected in the OTS Screen.



### Selecting Immediate Stock / WIP Details



## 6. Review Immediate Stock options

By default, immediate stock or immediate goods refers to items available right away. So the settings below to consider stock and orders only excludes WIP by default.

**NEW!** We have added a new feature to consider open/hold orders in your system up to a specific date to ensure that your immediate goods calculations can work based on your business needs.

The screenshot shows the 'Sync Inventory Settings' interface. At the top, there are two radio buttons: 'OTS' (unselected) and 'Immediate Stock / WIP Details' (selected). Below this is the 'Immediate Stock Calculation Settings' section, which contains the 'Immediate Stock Formula' sub-section. In this sub-section, there are three checked checkboxes: 'Consider Stock', 'Consider Orders', and 'Consider Orders Upto'. The 'Consider Orders Upto' option is highlighted with a green background. Below the 'Consider Orders Upto' option, there are two dropdown menus: the first is set to 'Next Month' and the second is set to '03/31/2016'.

### 6.1 Immediate Stock Formula

By default if you choose 'All open/hold orders' that means AIMS360 is looking at orders for all delivery dates into the future.

*Example: you have 100 units of style ABC123. You have orders 2 months from now for 100 units. OTS would be 0, even though you actually may be able to sell those goods today and replace them through production before the needed delivery date 2 months out.*

By setting the option to Consider order up to (and based on your understanding of your own production timing and needs), you can make that stock available for immediate sale if desired.

In the example here we are looking forward to the end of the next month. By choosing 'Next Month' in the date drop down it will auto change to the next month as the dates change, however, you can select any one of our available options or set a specific date yourself.

**NOTE:** Setting a date requires you to update it manually as needed.

The screenshot displays the 'Sync Inventory Settings' interface. At the top, there are two radio buttons: 'OTS' (unselected) and 'Immediate Stock / WIP Details' (selected). Below this is the 'Immediate Stock Calculation Settings' section, which contains a sub-section 'Immediate Stock Formula'. In this sub-section, there are four checked checkboxes: 'Consider Stock', 'Consider Orders', 'Deduct All Orders', and 'Consider Pending'. There are also two radio buttons: 'All Open/Hold Orders' (unselected) and 'Consider Orders Upto' (selected). A dropdown menu is open for 'Consider Orders Upto', showing a list of options: 'Next Month', 'This Fiscal Quarter to date', 'This Fiscal Year', 'This Fiscal Year to date', 'Yesterday', 'Last Week', 'Last Week to date', 'Last Month', 'Last Month to date', 'Last Fiscal Quarter', 'Last Fiscal Quarter to date', 'Last Fiscal Year', 'Last Fiscal Year to date', 'Next Week', 'Next 4 Weeks', 'Next Month', 'Next Fiscal Quarter', and 'Next Fiscal Year'. The 'Next Month' option is currently selected in the background dropdown. To the right of the dropdown, there is a date field showing '03/31/2016'. Below the 'Consider Orders Upto' dropdown, there is another date field also showing '03/31/2016'. At the bottom of the 'Immediate Stock Calculation Settings' section, there is a 'Do You want to calculate' dropdown set to 'Yes'. Below this is the 'WIP details settings' section, which includes an 'Upload WIP Details' checkbox (checked) and a radio button for 'Yes' (selected).

## No Immediate Stock

In this example, I have orders next month, but with no stock and no WIP this month, I have no goods to send to NuOrder.

Home | System Settings | Sync Inventory | Styles

Close Refresh Support

Apply Sync Qty values to the selected products

Sync Qty   % of AIMS360 Qty

System Views My Views Inventory Information Views Auto Width File System Number of records: 96 [View records count](#)

group by area Drag a field here to group by that field

Select	Style	Color	Color Description	Size Description	SKU	Aims Stock	WIP Stock	Orders	Picked	OTS Stock	Sync Type	Immediate Stock	WIP Qty	Wip Date	NuOrder Stock
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	XS		0	0	4	0	-4	Immediate	-4		Immediate	17
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	S		0	0	8	0	-8	Immediate	-8		Immediate	12
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	M		0	0	8	0	-8	Immediate	-8		Immediate	11
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	L		0	0	4	0	-4	Immediate	-4		Immediate	15
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	XL		0	0	0	0	0	Immediate	0		Immediate	20
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	XS		0	0	4	0	-4	Immediate	-4		Immediate	16
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	S		0	0	8	0	-8	Immediate	-8		Immediate	11
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	M		0	0	8	0	-8	Immediate	-8		Immediate	11
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	L		0	0	4	0	-4	Immediate	-4		Immediate	14
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	XL		0	0	0	0	0	Immediate	0		Immediate	20

## 6.2 Formula for OTS

You can configure the OTS Calculation for immediate goods to include WIP, Picked good etc as needed.

Since we are trying to sync only immediate goods I have selected the WIP cut off date to be the current month only.

Formula used to calculate OTS (which is displayed on the immediate stock rows in the sync inventory screen)

- Consider Stock
- Consider WIP
- Consider Orders
- Deduct All Orders on Pick Tickets
- Consider Pending Web Orders

Do You want to calculate OTS based on delivery date **Yes**

**This Month** | **02/29/2016**

Select	Style	Color	Color Description	Size Description	SI	Aims Stock	WIP Stock	Orders	Picked	OTS Stock	Sync Type	Immediate Stock	WIP Qty	Wip Date	NuOrder Stock	Stock Moving
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	XS		0	0	4	0	-4	Immediate	-4		Immediate	17	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	S		0	0	8	0	-8	Immediate	-8		Immediate	12	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	M		0	0	8	0	-8	Immediate	-8		Immediate	11	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	L		0	0	4	0	-4	Immediate	-4		Immediate	15	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	XL		0	0	0	0	0	Immediate	0		Immediate	20	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	XS		0	0	4	0	-4	Immediate	-4		Immediate	16	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	S		0	0	8	0	-8	Immediate	-8		Immediate	11	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	M		0	0	8	0	-8	Immediate	-8		Immediate	11	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	L		0	0	4	0	-4	Immediate	-4		Immediate	14	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	XL		0	0	0	0	0	Immediate	0		Immediate	20	0
<input type="checkbox"/>	8133CJ	CJ291	TEAL/ORA/BLK TIGER	XS		0	0	0	0	0	Immediate	0		Immediate	19	0

So with the new immediate feature, as you can see from the info above I have previously sent stock over to NuOrder, but now I need to either zero it out or change my inventory sync options to include WIP through next month etc if needed.

### 6.3 Adding additional WIP

I have increased my WIP date to Next month.

Sync Inventory Settings

OTS  Immediate Stock / WIP Details

Immediate Stock Calculation Settings

Immediate Stock Formula

- Consider Stock
- Consider Orders
- All Open/Hold Orders  Consider Orders Upto

Next Month 03/31/2016

Formula used to calculate OTS (which is displayed on the immediate stock rows in the sync inventory screen)

- Consider Stock
- Consider WIP
- Consider Orders
- Deduct All Orders on Pick Tickets
- Consider Pending Web Orders

Do You want to calculate OTS based on delivery date Yes

Next Month 03/31/2016

## 6.4 Re-run the Sync Inventory option

We now see that there is WIP due in next month and I have a small QTY of OTS Stock based on the current Stock, Orders and WIP in the system, However I still have NO Immediate stock available. But we can send the WIP to NuOrder (as shown below) but if we select a sync QTY based on this information, we cannot send any actual stock to NuOrder aside of future WIP.

**NOTE:** NuOrder carries your WIP inventory separately from immediate stock, so for each style/color/size with WIP a second entry will show here.

Apply Sync Qty values to the selected products

Sync Qty:   % of AIMS360 Qty

System Views: Inventory Information | Views | Auto Width | File System | Number of records: 121

Select	Style	Color	Color Description	Size Description	Aims Stock	WIP Stock	Orders	Picked	OTS Stock	Sync Type	Immediate Stock	WIP Qty	Wip Date	NuOrder Stock	Stock Moving
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	XS	0	6	4	0	2	Immediate	-4	6	03/21/2016	17	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	XS						Wip		12	Immediate	12	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	S	0	12	8	0	4	Immediate	-8	12	03/21/2016	0	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	S						Wip		12	03/21/2016	0	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	M	0	12	8	0	4	Immediate	-8	12	Immediate	11	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	M						Wip		12	03/21/2016	0	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	L	0	6	4	0	2	Immediate	-4	6	Immediate	15	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	L						Wip		6	03/21/2016	0	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	XL	0	0	0	0	0	Immediate	0	0	Immediate	20	0
<input type="checkbox"/>	8133CJ	CJ261	CHO/LIME POLKA DOT	XL						Wip		0	03/21/2016	0	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	XS	0	6	4	0	2	Immediate	-4	6	Immediate	16	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	XS						Wip		6	03/21/2016	0	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	S	0	12	8	0	4	Immediate	-8	12	Immediate	11	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	S						Wip		12	03/21/2016	0	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	M	0	12	8	0	4	Immediate	-8	12	Immediate	11	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	M						Wip		12	03/21/2016	0	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	L	0	6	4	0	2	Immediate	-4	6	Immediate	14	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	L						Wip		6	03/21/2016	0	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	XL	0	0	0	0	0	Immediate	0	0	Immediate	20	0
<input type="checkbox"/>	8133CJ	CJ286	HOT PINK/BLK CRACKED	XL						Wip		0	03/21/2016	0	0

Sync Inventory from AIMS360 to NuOrder

## See Sync Inventory Instructions

NuOrder - Sync inventory using OTS