

**SPECIAL ORDER SALES (SOS)
WEBFORMS VENDOR PACKET FOR
LoweLink[®]**

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Lowe's Special Order Sales (SOS) WebForms allow our SOS trading partners to receive special order sales from Lowe's, send order statuses to Lowe's, and invoice through LowesLink®. Lowe's created SOS WebForms to provide our trading partners with a low cost EDI solution. This is done by allowing our trading partners to use a web browser to interact with our EDI system over the Internet. This document provides you with the requirements to begin utilizing Lowe's SOS WebForms. If an SOS vendor prefers using Full-Integration EDI to exchange SOS documents electronically with Lowe's, they should contact Lowe's EDI.

SOS Processing & Vendor Requirements

- Trading partners must be approved by Lowe's Merchandiser to supply Lowe's Special Order product.
- All SOS Item Data must be setup in Lowe's SOS electronic catalog formats before moving to production.
- SOS WebForm users must submit an SOS WebForm Registration Form. See 'Getting Set-Up' section.
- Hardware/Software requirements are outlined within the LowesLink® registration process.

Getting Set-Up on SOS WebForms

- New users - go to www.loweslink.com, click on the Getting Started section and complete the registration.
- Users with a LowesLink® profile - choose 'Change My Access' after logging-in request the SOS WebForms application.

How to Log-in to SOS WebForms after obtaining access to SOS WebForms

1. Open www.loweslink.com and click 'Login' on the top right-hand corner of the page, or select the 'Login to LowesLink' key on the left-hand side of the page, next click OK on the LowesLink® welcome screen.
2. 'LowesLink Applications' screen - click 'EDI WebForms'.
3. Main menu - choose 'SOS WebForms'.

SOS WebForm Screens

There are four basic screens used in Production on SOS WebForms.

1. View New SOS Purchase Orders – used to view and print New 'Original' SOS POs.
2. View Cancelled SOS Purchase Orders – used to view, print, and accept Cancelled POs.
3. View SOS Purchase Orders Waiting for a Status – used to apply Order Statuses throughout the lifecycle of the PO.
4. View Completed SOS Purchase Orders (Completed Within Past 90 Days) – An SOS PO with shipped, delivered, or cancelled statuses is displayed for 90 days from the date it is moved to the Completed screen.

Using the 'Create a Test SOS Purchase Order' option displayed on the Main Menu is explained in 'SOS Purchase Order Testing'.

Transaction History and Notes - All screens, except the New Purchase Order screen, have an 'Options' column for viewing Order Statuses submitted for a PO as well as for viewing notes the vendor enters for a PO.

- Transaction History - The lifecycle of the PO is displayed when this option is selected, with Exceptions highlighted in red.
- Transaction Notes - To view or enter 'Notes', select the second icon in 'Options'. These are not visible to Lowe's store.

Additional SOS Information

- An SOS PO may include the same item number repeated more than once for an item in the same PO.
- Item Substitutions and Backorders - No replacement, substitution, or backordered items are allowed for SOS POs. Any change to the PO from Lowe's will require the Original PO to be cancelled and a new PO(s) created.
- Multiple shipments are not allowed - All of the ordered product must be shipped at the same time!
- Faxed/Phoned Orders - If a store phones/faxes an SOS PO, the vendor must verify with the store that the order was not also sent via WebForms. The store should be placing manual orders only when the model is not in the SOS catalog.
- Invoicing – Vendor's will be able to turnaround invoices from the SOS POs or create invoices from scratch using WebForm Invoices. If preferred, invoice using Full-Integration EDI but process the SOS POs using SOS WebForms.
- Data Integration – SOS WebForm data cannot be integrated with any of the vendor's system applications.

Using the WebForm Application

- After the user registers, completes testing, and the SOS catalog is approved, SOS POs can be accessed via WebForms.
- SOS WebForm Instructions On-Line - Also located in the 'Options' box on the bottom left-hand side of the SOS WebForms screen is a link to this document. It is displayed in the box as 'SOS WebForm Instructions'.
- Use these key documents to ensure Order Statuses meet requirements - [Order Status Matrix](#) and [Order Status Milestones](#).
- Scrolling through the Screens – A maximum of 20 POs are listed per screen. Use the numbers in the lower right-hand corner of the screen to advance to the next screen to see additional orders. Use 'Prev' or 'Next' options to also scroll.
- Sorting the Purchase Orders – Click on a column heading to sort the data in ascending or descending sequence.
- Using the Side Bar Menu - Scroll between screens by using the Side Bar Menu, or hide the Side Bar to enlarge the screen.

SOS Purchase Order Testing

Let's begin testing SOS WebForms! The following steps outline the four tasks to complete before moving to Production. Lowe's EDI will email the next step after you complete task 4.

It is IMPORTANT to review all of the sections in this document on SOS WebForms to become familiar with receiving Original and Cancelled SOS POs, applying Order Statuses, and knowing when to proceed with filling the PO or holding it because of Order Status Exception(s) that require a response from Lowe's store.

Log-In - Once access to SOS WebForms is obtained, follow the log-in steps in 'How to Log-in to SOS WebForms'.

Task 1: Review the Email Alert received on a New SOS Order for the test

1. Click 'Create a Test SOS Purchase Order'.
2. This will generate the new PO email alert to be sent for the test. Print the email received.

Task 2: Review a New SOS Purchase Order

3. Main Menu - Select 'View New SOS Purchase Orders'.
4. Click anywhere on the line displaying the PO number to view the PO.
5. Click OK to print it. This is a generic test order that contains bogus test item information. Select 'Return to List'.

Task 3: Submit One Order Status

6. Side Bar Menu - Click 'View SOS Purchase Orders Waiting for a Status'. The test PO is listed with an 'Acknowledged' status. Click anywhere on the line displaying the PO number to select it.
7. From the drop down box beside 'Select PO Status', select the 'Approved' status. Select Submit.
8. A confirmation screen shows the status submitted.
9. Select the 'Return to List' button. The 'Waiting for a Status' screen is displayed. The PO now has an 'Approved' status.
10. Select the PO again from the Waiting for a Status screen, and print it using the web browser.

Task 4: Notify Lowe's EDI Coordinator the test is completed (perform Task 4 only once for the vendor's company)

11. After reviewing the documents produced from the previous tasks, send an email to Lowe's EDI confirming the SOS WebForm Test is completed; include user and company names, and phone number. This completes testing SOS POs via Webforms!

If multiple users complete the test, only one email is needed for Lowe's EDI. This will allow Lowe's to move the vendor to production when the first test is performed for SOS WebForms. The vendor's users can conduct this PO test as often as needed to test submitting other order statuses as explained in this document. Test store 9781 and PO number 12345 will be used for each test, with the project number changing per test performed.

Follow-up - Lowe's EDI will send an email when the vendor is moved to production on SOS WebForm POs and Order Statuses.

Invoicing - The vendor should contact Lowe's EDI to test Invoices.

Deleting Test Data - Any tests created for the test store 9781 will be automatically deleted within 24-hours.

Purpose of Testing

The main purpose of this test is to make sure that we can communicate (send POs, send email notifications, and receive Order Statuses). The remainder of this document explains processing SOS POs in Production. We hope each user finds SOS WebForms is an easy application for receiving SOS POs and submitting SOS Order Statuses.

Thank you for completing the test!

SOS Purchase Orders in Production

Before a vendor can receive SOS POs via WebForms, the test explained in 'SOS Purchase Order Testing' must be completed.

View New (Original) SOS POs

1. PO Released - Once the PO is released through Lowe's SOS system, it is posted in SOS WebForms. Each PO displays the
 - a. PO Type as a New (Original) or Cancellation PO, and
 - b. Delivery Type as a delivery to a Lowe's Store or direct delivery to the Customer/Installer.
2. Email Alert on new PO – An email notifies the vendor when an Original PO or Cancellation PO is posted in WebForms.
3. Login – The SOS PO can be retrieved and printed after logging-in to LowesLink®.
4. New POs - From the Main Menu or Side Bar, select 'View New SOS Purchase Orders'.
5. New PO Status - one of these statuses is displayed
 - a. NEW – Shows the PO was released less than 24-hours from the PO being posted.
 - b. OVERDUE-NEW – Indicates the PO was not reviewed timely and it has been more than 24-hours from the PO posting. If this occurs, except over the weekend, verify Email Alerts are being received to promptly take action on new POs. An email is also sent for an 'Overdue-New' status requesting immediate attention for the new SOS PO.
6. Viewing Options on New SOS Purchase Orders screen (the same options can be used for viewing SOS PO Cancellations)
 - a. Option 1 - Click the word 'here' shown in Option 1 to print a maximum of 20 orders at a time.
 - b. Option 2 - Select each PO individually to view and print one order at a time.
7. Line Numbers – The line numbers for the items in the PO may not be sequential. This occurs when items for a project are from different vendors. Also, configurable items will include an 80,000 series of numbers, and 90,000 for service items.
8. After the order is viewed, the PO is moved to 'SOS Purchase Orders Waiting for a Status' with an 'Acknowledged' status. This indicates the PO has only been viewed/printed by the vendor. The user should next submit an Order Status within 24-hours from the time the Email Alert on the new PO is sent.

View SOS PO Cancellations

1. It is IMPORTANT to understand when an SOS PO can be cancelled along the requirements for accepting Cancelled POs. These are Lowe's business rules for releasing WebForm SOS PO Cancellations in regards to the stage of the PO.
 - ❖ For shipments to a Lowe's store, the PO can be cancelled until the customer picks it up or until Lowe's delivers it to the customer. The PO can be cancelled by Lowe's after receiving the Approved, Committed, or Shipped Status.
 - ❖ For direct to customer shipments, the PO Cancellation can be sent until the Shipped Order Status is received from the vendor. The PO can be cancelled by Lowe's after receiving the Approved or Committed Order Status.
2. With cancellations, the entire PO is cancelled. An email alert is sent to the vendor when Cancelled SOS POs are released. The vendor should **Accept the Cancelled PO within 24-hours** from the time it is sent. By accepting the Cancelled PO, a Cancelled Order Status is returned to Lowe's.
3. When Cancelled SOS POs are posted, those will be automatically displayed when logging-in. This allows the vendor to promptly stop building the shipment and process the cancellation. The Main Menu can also be used to select Cancelled POs.
4. After the PO Cancellation is accepted, it is moved to 'Completed SOS Purchase Orders' with a status of 'Cancelled'.
5. It is possible a new Original SOS PO is released but immediately cancelled. If this occurs, the new SOS PO is not visible but the Cancellation PO will require the user to Accept the Cancellation PO. Any questions can be directed to the store.

Apply Order Statuses for SOS POs in Production (Lowe's processes Statuses within 15-30 minutes from receiving them)

1. Select the PO from 'View SOS Purchase Orders Waiting for a Status'. The current PO status is displayed for each PO listed.
2. Required Order Statuses for Original SOS POs – Each Original PO requires various Order Statuses to be submitted by the vendor throughout the lifecycle of the PO. A minimum of three Order Statuses must be submitted to indicate Approved, Committed, and Shipped for each PO that is shipped as ordered without exceptions, plus an additional Order Status for direct to customer shipments.
 - ❖ **1st Order Status is required within 24-hours** from the time the Email Alert is sent. The initial Order Status can be 'Approved' or submitted as an 'Exception'.
 - ❖ **2nd Order Status is required within 48-hours** from the time the Email Alert is sent if there are no pending Exceptions. It is the 'Committed' Status which indicates the order is committed to being manufactured.
 - ❖ **3rd Order Status is required when the order is shipped.** It should be sent by the PO Delivery Date.
 - ❖ **4th Order Status Required for Customer Direct Shipments** – After the PO is delivered direct to the customer, submit the 'Delivered' Status. This is not required for shipments to a Lowe's location.

For SOS POs released over the weekend, the 1st Order Status must be submitted the morning of the vendor's next business day. This will also impact the timing for the 2nd required Order Status and it should be sent promptly as well.

3. Required Order Statuses for SOS PO Cancellations – Clicking 'Accept' for the PO Cancellation will apply a Cancelled Status for the PO. The vendor should **Accept the Cancelled PO within 24-hours** from the time it is posted or it will be displayed as overdue. For those posted over the weekend, accept them the morning of the vendor's next business day.
4. When an Exception is submitted in error and Approved is submitted next, the original PO is used for the Approved Status.

5. The options listed for Statuses include 'Manually Cancelling' a PO. The vendor should ONLY apply a Manual Cancellation when requested by Lowe's.
6. Priority for Applying Order Statuses – For POs listed on the 'Waiting for a Status' screen, use this guideline to apply statuses.
 - a. First, focus on 'Overdue'. Second, address 'Acknowledged'. Then review 'Approved' and 'Committed' next. It is important to submit the 'Shipped' and 'Delivered' Order Statuses timely. For the other POs, apply them as their status changes.
 - b. Those statuses preceded with 'REJECTED' should not require additional statuses until Lowe's advises how to proceed.
 - c. If the next order status is not submitted as required, an email notification asks for the user's immediate attention.
7. How to Apply Order Statuses – Use this guideline for applying Order Statuses.

Select	Select each PO individually to apply a status.
Current Status	When the PO is selected, its 'Current Status' is displayed at the top of the screen.
Select Status	Using the '-Select PO Status-' drop down, click the next status.
Order Exceptions/ Item Status	Select 'Exceptions' from '-Select PO Status-', enter the type of exception(s). Apply a status for <ul style="list-style-type: none"> • Entire PO - select type of Exception from the 'Order Exceptions' drop down, • Each Item - select type of Exception from the 'Item Status' drop down (one exception per item).
Click Submit	After highlighting the next status, click the 'Submit' button located to the right of the status.
Confirmation	After submitting a status, a confirmation of the status submitted is displayed.
Action	The Confirmation screen will also display the next step needed for the PO.
Return to List	To return to 'Waiting for a Status', select 'Return to List' on the Confirmation screen or use the side bar.
New Status	The new status is displayed. After 'Shipped' or 'Delivered' statuses are applied, the PO is moved to 'Completed SOS POs'.
History/Notes	See the section on 'Transaction History and Notes' for more information on viewing PO details.

8. **Applying Various Order Statuses** – Use the '[SOS WebForms Order Status Matrix](#)' and '[SOS WebForms Order Status Milestones](#)' for information on the statuses required for each specific stage of the PO, including exceptions and cancellations. All WebForms documentation is on [Lowe'sLink®](#)

This is a brief summary of the Order Statuses.

Summary of the Order Statuses WITHOUT Exceptions	
Order Status	Type of WebForm Order Status
Acknowledged	PO viewed/printed (automatic status)
Approved	PO can be filled as ordered; no Exceptions exist (24-hour status)
Committed	Committed/allocated to be manufactured (48-hour status)
Shipped	PO Shipment Complete (apply by PO Delivery Date)
Delivered	Order Delivered to Customer/Installer (not applicable for store shipments)
Cancelled	Send in response to a WebForm SOS PO Cancellation; Accept Cancellation (24-hour status)

Summary of the Order Statuses WITH Exceptions	
Order Status	Type of WebForm Order Status
Incorrect Address	Customer's address is incorrect; obtain correct address from Lowe's; continue fulfilling PO to meet PO Delivery Date
Incorrect Price	PO approved with Price discrepancy for item(s); discuss handling PO with Lowe's; update catalog
Item/Model Invalid	PO has an item(s) with invalid item/model information; PO rejected; update catalog (see Matrix on Unit of Measure)
Item Discontinued	PO has an item(s) that has been discontinued; PO rejected; update catalog
Complete Out-of-Stock	Item(s) has zero available to ship by Delivery Date (prefer new date if known); PO rejected
Partial Out-of-Stock	Cannot ship order quantity for an item(s); do not continue fulfilling PO
Date Change due to	
-New Delivery Date	Cannot meet PO Delivery Date; New Delivery Date for Entire PO; continue shipping unless notified
-Ship Date Change	PO cannot be delivered by PO Delivery Date; only Ship Date known; continue shipping unless notified
-Item Date Change	Some items cannot meet PO Delivery Date; indicate new Delivery Date or Ship Date per item; PO rejected
-Vendor Carrier Delay	Cannot deliver by PO Delivery Date; Rescheduled Delivery Date for Entire PO; continue shipping unless notified
-Delivery Incomplete	Direct delivery to customer could not be completed; include new Delivery Date

Who to Contact with Questions

- Lowe's - All questions for customers will be negotiated by Lowe's with the customer and vendor.
- Lowe's Merchandising Team - Approval as a Lowe's SOS Vendor, Identifying the types of POs for a vendor
- Lowe's SOS Team - SOS Electronic Catalogs, Pricing Discrepancies
- Lowe's Store - Phoned/Faxed POs
- Lowe's SOS Hotline 855-658-2700, Option 2 - PO Content, Shipping Address, Resolving PO Exceptions
- EDI-Production@Lowe.com - SOS processing after certified for SOS WebForms, Change Email Address for PO Alerts
- EDI-Implementation@Lowe.com - SOS WebForm setup, Testing POs and Invoices
- EDICompliance@Lowe.com - SOS PO Order Status Compliance – Lowe's EDI Compliance will notify the vendor via email



Welcome to LowesLink®

SOS WebForms

www.loweslink.com

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- WebForms@Lowe.com - Cannot access LowesLink®, Register for LowesLink® (also see 'Getting Set-Up')
 - VendorInquiry@Lowe.com - Invoice questions after certified on SOS WebForms

Thank you for your continued partnership with our SOS Program at Lowes!