WEBFORMS SOS ORDER STATUS
BEST PRACTICES & FAQS

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The WebForms SOS Order Status is transmitted by Lowe's Special Order (SOS) WebForm trading partners to convey information on each stage of an SOS Purchase Order (PO) until it is shipped/delivered. It is also used to report exceptions for an SOS PO such as re-scheduling the delivery date or providing an out-of-stock condition for an item. The timeliness and accuracy of the WebForms SOS Order Status is vital to the success of the SOS program for Lowe's and our SOS suppliers. This document provides the best practices for ensuring the WebForms SOS Order Status is in compliance with Lowe's requirements and supplies answers to common inquiries.

Best Practices

- *Follow Lowe's WebForms SOS Order Status specifications* - These documents are available on www.loweslink.com under EDI WebForms to assist in submitting the WebForms Order Status correctly and to provide an overview of the WebForms SOS process, or click on these links.
  - o LowesLink® WebForms Application Documents
  - o SOS WebForms Vendor Packet
  - o SOS Vendor WebForms Pre-Production Checklist
  - o SOS WebForms Order Status Matrix
  - o SOS WebForms Order Status Milestones

- *Submit an SOS Order Status for each stage of the SOS PO -* These are key documents for the SOS Order Status processes and data stream.
  - o SOS WebForms Order Status Matrix
  - o SOS WebForms Order Status Milestones

- *Within 24-hours of receiving the WebForms SOS PO, provide the SOS Order Status to Lowe's.*
  - o The first WebForms Order Status should indicate you have Approved the PO, or Rescheduling the Delivery Date. When there are exceptions, the first WebForms SOS Order Status should include the type of exception.

- *Within 48-hours of receiving the WebForms SOS PO, submit the SOS Committed Status.*
  - o The second WebForms Order Status should indicate you have Committed to manufacturing the product and it is allocated to production. When there are exceptions, see the SOS WebForms Order Status Matrix on sending the Committed Status per the Order Status exception.

- *When you cannot ship by the PO Requested Delivery Date, submit a Rescheduled Delivery Date in the SOS Order Status.*
  - o Submit a new Ship/Delivery date for the entire PO. Proceed with shipping the PO unless notified otherwise by Lowe's. Always submit a new Ship/Delivery date for the entire PO when the entire PO will be shipped/delivered on the new date. This also includes those POs with only one line item.
  - o For a PO with multiple line items and one of the items cannot be delivered by the PO Requested Delivery Date, a new Ship/Delivery Date should be sent for the specific item(s). For all other items on the PO that can meet the PO Requested Delivery Date, you are not required to enter a status. Those will default to Approved. Do not proceed with shipping the PO. Lowe's will cancel the PO and may release new POs. The Rescheduled Delivery Date status at the item level for POs with only one line item is not accepted; submit it for the entire PO.

- *For Customer Direct deliveries, send the Delivered Status as soon as the PO is delivered.*

- *Ship complete –* The entire PO must be shipped together as Lowe's does not accept multiple shipments for a PO.

- *When the PO cannot be filled as ordered, send the Order Status Exception.*
  - o Use this document for guidelines: SOS WebForms Order Status Matrix

- *Process SOS PO Cancellations as soon as they are received.*

- o Once you Accept the Cancelled Order, it will be moved to Completed SOS Purchase Orders. The status will be displayed as 'Cancelled'.
- o Accept the SOS PO Cancellation within 24-hours of the date of the PO Cancellation.
- o It is preferred to only use the Manual Cancel option if the store cannot submit the PO Cancellation via WebForms. The vendor should never cancel without specific instructions from Lowe's. The Manual Cancel is not sent to Lowe's store.
- o See information on Cancellations in the SOS WebForms Vendor Packet

- **Place all SOS POs with item level exceptions on hold, except for a price discrepancy.**
  - o All item level exceptions, except for a price discrepancy, will cause the PO to be cancelled. Lowe's will consult with the customer and may create a new PO.

- **Send it timely** - Use this information for measuring your company's Order Status data flow to ensure an Order Status is submitted for each stage of the SOS PO.
  - o SOS WebForms Order Status Matrix
  - o SOS WebForms Order Status Milestones
  - o When it is not feasible to transmit the Order Status within the 24 and 48 hour windows on weekends or holidays, the Order Status must be transmitted the morning of the vendor's next business day.

- **An SOS Vendor should not contact the customer directly with questions about an SOS PO.**
  - o All exceptions should be reported via the SOS WebForms Order Status.
  - o All questions about an SOS PO should be funneled through Lowe's.
  - o Lowe's will negotiate all exceptions/questions with the customer/vendor.

- **No replacement items, substitution items, or backordered items are allowed.**

- **There should be only one Order per WebForm Order Status transaction.**

Where to find help on the WebForm SOS Order Status
- Take a look at LowesLink® WebForms Application Documents
- Review the timeliness of the Order Status transactions for each stage of the PO as outlined in the SOS WebForms Order Status Milestones
- Questions on what happens next after submitting the WebForm Order Status can be found in the SOS WebForms Order Status Matrix
- Also view the SOS WebForms Vendor Packet for additional contacts on SOS.
- The SOS Vendor WebForms Pre-Production Checklist should be of benefit to you as well.

Also view the next section that includes information on Frequently Asked Questions.

Lowe's appreciates your assistance in transmitting accurate and timely WebForms SOS Order Statuses for our SOS program with your company.

Frequently Asked Questions (FAQs)

1) Why does Lowe's need to know the Order Status for an SOS PO?

2) What happens if the Order Status is not sent as required?

3) When an Order Status is sent with an Exception, what occurs?

4) How soon will the Order Status post in Lowe's system and a notification sent to the customer on the status provided in the Order Status?

5) What is the Order Status criteria?

6) How do I know if my company's Order Status data is in compliance?

7) What are the Statuses for Shipping as Ordered?

8) What are the Statuses for Rescheduling the Delivery Date for entire PO and next steps?

9) What is the Status for Rescheduling the Delivery Date for one item on a multiple line item PO and next steps?

10) If the vendor can ship earlier than the PO Requested Delivery Date, is an Order Status Rescheduled Date Order Status needed?

11) When a customer revises an order what occurs?

12) What are the Order Exceptions that impact the entire PO?

13) What are the Exceptions that impact only a line item on a multi-item PO?

14) When an item is not available to meet the PO Requested Delivery Date, should the Order Status include an Out-of-Stock Status or a Rescheduled Delivery Date at the Item Level?

15) If the vendor can ship some of the item quantity ordered and ship the remaining quantity later, is this acceptable?

16) If the PO has to be shipped in multiple containers, is this acceptable and can the vendor send separate Order Statuses per container?

17) Why would an SOS PO include an Invalid/Discontinued Item and what Order Status Exception is required?

18) What causes an SOS PO to be Cancelled and what action should be taken by the vendor?

19) Can a vendor cancel a PO?

20) Can multiple exceptions be submitted for an item?

21) Are Order Statuses required for All WebForm SOS POs?

22) For each stage of the SOS PO, when can an Order Status be submitted for Rescheduling the Delivery Date?

23) After the Committed Status is submitted and a change is needed for the PO Delivery Date, an Order Status with a Rescheduled Delivery Date will be submitted. Does the vendor need to submit another Committed Status?

24) When a Price Exception occurs with a PO, what Order Status should be submitted?

25) Is it acceptable for the vendor to contact the customer directly?

26) If the vendor does not receive a response from Lowe's on an Order Status Exception, who should the vendor contact?

27) What occurs when a customer requests changes to an SOS PO that has been transmitted to an SOS EDI WebForm Vendor?

28) What if the vendor cannot send the WebForm Order Status within the time constraints for a status?

29) If an SOS PO has the same item number repeated more than once in the PO, can the quantity be summed and included only once in the Order Statuses that requires line item detail?

Thank you for your support of Lowe's SOS program with your company.

***** This section includes the Questions & Answers for the Question Hyperlinks above *****

1) ***Why does Lowe's need to know the Order Status for an SOS PO?***
   a) It is important for Lowe's and our SOS Customers to know the status of an SOS PO throughout the lifecycle of the PO.
   b) When orders can be filled as ordered, those Order Statuses provide updates and confirms the PO should arrive as ordered and by the Requested Delivery Date. These orders do not require any manual follow-up between Lowe's, the customer, and the vendor.
   c) For those SOS POs that cannot be fulfilled, an Order Status Exception allows Lowe's to review the exception with the customer and resolve it between the customer/vendor.

Go Back to Questions

2) <u>What happens if the Order Status is not sent as required?</u>
   a) Lowe's and the customer will not know if the PO can be shipped as ordered.
   b) A manual follow-up by Lowe's SOS Team will be necessary.
   c) Lowe's EDI will notify the vendor of Order Status non-compliance.

<u>Go Back to Questions</u>

3) <u>When an Order Status is sent with an Exception, what occurs</u>?

    a) This may result in Lowe's revising the order which creates a Cancellation PO and a new Original PO. It may cause the PO to be cancelled altogether.

    b) As soon as the Exception is identified, submit it in the WebForm Order Status. When it is the first Order Status, submit it within 24-hours of the PO Date.

    c) Except for a Rescheduled Delivery Date for the entire PO, do not ship or send the Committed, Shipped, and Delivered Order Statuses until all exceptions are resolved.

    d) Only one exception can be reported per line item in the WebForm Order Status.

    e) In multi-line item POs with item exceptions, you are required to enter a Status only for the item with the exception. Those that are not entered with an exception will default to Approved.

    f) All Order Statuses with exceptions that are conveyed to Lowe's will be negotiated by Lowe's with the customer and vendor.

<u>Go Back to Questions</u>

4) <u>How soon will the Order Status post in Lowe's system and a notification sent to the customer on the status provided in the Order Status</u>?

    a) Lowe's SOS system application is updated with each Order Status status within 15-30 minutes from the time Lowe's receives the vendor's Order Status. This allows Lowe's to keep our customers current on the status of their SOS PO.

<u>Go Back to Questions</u>

5) <u>What is the Order Status criteria</u>?
    a) See the summary of the various Order Statuses that can be submitted in the <u>SOS WebForms Vendor</u>
        <u>Packet</u>

<u>Go Back to Questions</u>

6) <u>How do I know if my company's Order Status data is in compliance</u>?
    a) Lowe's will send two reports daily to the SOS EDI WebForm Vendors with Order Status non-compliance information.
        i)   One report will include Order Statuses that could not be processed by Lowe's system application.
        ii) Another report will include Order Statuses that are missing.
        iii) Both of these reports require immediate action by the vendor.

<u>Go Back to Questions</u>

7) <u>What are the Statuses for Shipping as Ordered</u>?
   a) These are the required WebForm Order Statuses for all SOS POs that are processed without exceptions.
      i) 1st Order Status=Approved for the entire PO; send within 24-hours from the SOS PO being transmitted; exclude item detail.
      ii) 2nd Order Status=Committed for the entire PO; send within 48-hours from the SOS PO being transmitted; exclude item detail.
      iii) 3rd Order Status=Shipped for the entire PO; send when the order is shipped and before the PO Requested Delivery Date. All items on the PO will be processed as Shipped.
      iv) 4th Order Status=Delivered for the entire PO for Customer Direct Shipments only to indicate a Delivered Status.

<u>Go Back to Questions</u>

8) What are the Statuses for Rescheduling the Delivery Date for entire PO and next steps?
    a) Send either a Ship Date Change or Delivery Date Change for the entire PO; exclude item detail.
    b) All items should be shipped or delivered on the new date.
    c) When this is the first status for the PO, send it within 24-hours from the SOS PO being transmitted.
    d) If the Delivery Date cannot be met after other statuses are submitted, submit it as soon as the shipment exception is identified.
    e) If the PO is not cancelled due to the date change, continue shipping and sending the Committed and Shipped statuses, along with Delivered status if direct to customer.

Go Back to Questions

9) <u>What is the Status for Rescheduling the Delivery Date for one item on a multiple line item PO and next steps</u>?
    a) Do not enter any Order Exception since you are reporting Item Exceptions.
    b) Send either a Ship Date Change or Delivery Date Change at the Item level along with the Rescheduled Date for the item that cannot meet the PO Requested Delivery Date.
    c) For all other items on the PO that can meet the PO Requested Delivery Date, you are not required to enter a status. Those will default to Approved.
    d) Do not proceed with shipping the PO as each SOS PO must be shipped complete. Lowe's will either ask the vendor to reschedule the entire PO or will cancel it. It is also possible Lowe's will issue two new POs; one PO for all items that can meet the PO Requested Delivery Date and another PO for the line item with the new Rescheduled Delivery Date.
    e) If this is the first status for the PO, send it within 24-hours from the SOS PO being transmitted.
    f) If the Delivery Date cannot be met after other statuses are submitted, submit it as soon as the shipment exception is identified.
    g) If the PO Delivery Date is not impacted, do not send an Order Status Exception.

<u>Go Back to Questions</u>

10) <u>If the vendor can ship earlier than the PO Requested Delivery Date, is an Order Status Rescheduled Date Order Status needed</u>?

    a)   Yes. If the shipment will arrive before the PO Requested Delivery Date, the vendor should submit a Rescheduled Date Order Status. This will be used to notify the customer of the date change. If the PO Delivery Date is not impacted, do not send an Order Status Exception.

<u>Go Back to Questions</u>

11) <u>When a customer revises an order what occurs</u>?
    a)   If there are no changes to current order sent to the vendor, a new PO will be issued for the new product.
    b)   If there are revisions to the current order sent to the vendor, Lowe's will cancel the original PO and a WebForms SOS PO Cancellation will be sent to the vendor. A new SOS PO will be issued.

<u>Go Back to Questions</u>

12) <u>What are the Order Exceptions that impact the entire PO</u>?
     a) See this document for Order Statuses for the entire PO: <u>SOS WebForms Order Status Matrix</u>

<u>Go Back to Questions</u>

13) <u>What are the Exceptions that impact only a line item on a multi-item PO</u>?
    a)   See this document for Item Level Exceptions: <u>SOS WebForms Order Status Matrix</u>

<u>Go Back to Questions</u>

14) <u>When an item is not available to meet the PO Requested Delivery Date, should the Order Status include an Out-of-Stock Status or a Rescheduled Delivery Date at the Item Level</u>?

   a) Lowe's prefers to always receive a Rescheduled Delivery Date instead of an Out-of-Stock Status. With the new date, Lowe's can notify the customer of the date change from the information included in the Order Status. With an out-of-stock status, Lowe's will contact the vendor to find out if the date is known.

<u>Go Back to Questions</u>

15) <u>If the vendor can ship some of the item quantity ordered and ship the remaining quantity later, is this acceptable</u>?
   a) No, the SOS PO must be shipped complete at the same time. Partial shipments are not accepted.
   b) Submit an Order Status with a Rescheduled Delivery Date when all of the item quantity ordered will be available for shipment.

<u>Go Back to Questions</u>

16) <u>If the PO has to be shipped in multiple containers, is this acceptable and can the vendor send separate Order Statuses per container</u>?

    a) When multiple containers are needed to ship the SOS PO, ensure those are shipped at the same time. Only one Shipped Status should be submitted to include the tracking information for both containers. When different carriers are used in this scenario for each container, the carrier and tracking information should be included per line item in the Shipped Status.

<u>Go Back to Questions</u>

17) <u>Why would an SOS PO include an Invalid/Discontinued Item and what Order Status Exception is required</u>?
   a) An invalid or discontinued item can be included on the SOS PO when the item has not been updated on the SOS catalog.
   b) Please contact Lowe's Merchandising Team to update the SOS catalog.
   c) Submit either an Invalid Item/Model or Discontinued Item beside the item that is invalid or discontinued.
   d) Do not proceed with fulfilling the order for the items that are valid. The Original SOS PO will be cancelled and a new PO may be issued.

<u>Go Back to Questions</u>

18) <u>What causes an SOS PO to be Cancelled and what action should be taken by the vendor</u>?
   a) If a customer changes their mind and does not want the product, they will ask Lowe's to cancel the PO.
   b) If a customer changes the quantity of an item or cancels an item on the PO, the original PO will be cancelled and a new PO issued. When a new item is added to an existing SOS project where a PO has been sent to the vendor, a new PO will be released for the single item. The original PO for the other items should not be impacted.
   c) If a vendor cannot ship as ordered, the customer may ask Lowe's to cancel the PO. The Order Statuses relay when the vendor cannot ship as ordered.
   d) The vendor should always Accept the Cancelled Order. It will then be moved to Completed SOS Purchase Orders. The status will be displayed as 'Cancelled'. Accept the SOS PO Cancellation within 24-hours of the date of the PO Cancellation.
   e) It is preferred to only use the Manual Cancel option if the store cannot submit the PO Cancellation via WebForms. The vendor should never cancel without specific instructions from Lowe's. The Manual Cancel is not sent to Lowe's store.
   f) See information on Cancellations in the <u>SOS WebForms Vendor Packet</u>

<u>Go Back to Questions</u>

19) <u>Can a vendor cancel a PO</u>?
  a) No, all SOS PO Cancellations should be sent by Lowe's in the WebForms SOS PO.
  b) Although a Manual Cancel is an option in WebForms SOS Order Statuses, it is preferred to only use the Manual Cancel option if the store cannot submit the PO Cancellation via WebForms. The vendor should never cancel without specific instructions from Lowe's. The Manual Cancel is not sent to Lowe's store.
  c) An Order Status Exception may cause the PO to be cancelled by Lowe's.

<u>Go Back to Questions</u>

20) <u>Can multiple exceptions be submitted for an item?</u>
   a) Multiple exceptions can exist per PO; only one exception per item.
   b) It is preferred **all PO Exceptions are submitted at the same time and within 24-hours from the PO posting.**

<u>Go Back to Questions</u>

21) Are Order Statuses required for All WebForm SOS POs?
   a) Yes, send an Order Status as outlined in the SOS WebForms Order Status Matrix and SOS WebForms Order Status Milestones documentation.
   b) When the SOS PO is sent manually to the vendor, the WebForms Order Status is not required.

Go Back to Questions

22) For each stage of the SOS PO, when can an Order Status be submitted for Rescheduling the Delivery Date?
   a) It should be submitted as soon as the vendor determines the PO Requested Delivery Date cannot be met. These are a few examples where this can occur:
      i)   When the PO is first received,
      ii) After the Committed Status has been submitted, or
      iii) When the Delivery cannot be completed.

Go Back to Questions

23) <u>After the Committed Status is submitted and a change is needed for the PO Delivery Date, an Order Status with a Rescheduled Delivery Date will be submitted. Does the vendor need to submit another Committed Status?</u>
   a)   No, an additional Committed Status is not needed.

Go Back to Questions

24) When a Price Exception occurs with a PO, what Order Status should be submitted?
   a) Do not enter any Order Exception since you are reporting Item Exceptions.
   b) Submit an Incorrect Price Order Status for the item that has the incorrect price. Repeat this for each item that has an incorrect price. Proceed with shipping the PO.
   c) It is important to always follow-up with Lowe's SOS Team to correct the catalog for future SOS POs.

Go Back to Questions

25) <u>Is it acceptable for the vendor to contact the customer directly?</u>
    a)   No, All Order Statuses with exceptions will be negotiated by Lowe's with the customer and vendor.

<u>Go Back to Questions</u>

26) <u>If the vendor does not receive a response from Lowe's on an Order Status Exception, who should the vendor contact?</u>
   a) The vendor should contact the Lowe's location included in the SOS PO. For all Lowes.com SOS POs, the Lowe's location will contain a value of 907. For follow-up on Lowes.com SOS POs, the vendor should contact Lowe's SOS Team.

Go Back to Questions

27) <u>What occurs when a customer requests changes to an SOS PO that has been transmitted to an SOS EDI WebForm Vendor?</u>
   a) When an item is removed or a quantity is changed, the original PO will be cancelled and a new PO released. The WebForm SOS PO Cancellation should be transmitted to the vendor for the vendor to Accept the Cancellation. See the information on SOS PO Cancellations for more information.
   b) When a new item is added to an existing SOS project where a PO has been sent to the vendor, a new PO will be released for the single item. The original PO for the other items should not be impacted.

<u>Go Back to Questions</u>

28) <u>What if the vendor cannot send the WebForm Order Status within the time constraints for a status?</u>
   a) All SOS WebForm Vendors should follow the guidelines for submitting the Order Statuses. It is important our SOS Vendors are providing the Order Statuses as required as Lowe's needs to be assured the vendor can fulfill the order and those statuses are sent as an update to our customer.

<u>Go Back to Questions</u>

29) <u>If an SOS PO has the same item number repeated more than once in the PO, can the quantity be summed and included only once in the Order Status that requires line item detail?</u>

    a)   No, the line items must be sent in the same sequence with the same number of line items as in the SOS PO. All of the line items in the WebForm SOS PO will be displayed in the WebForm Order Status.

<u>Go Back to Questions</u>