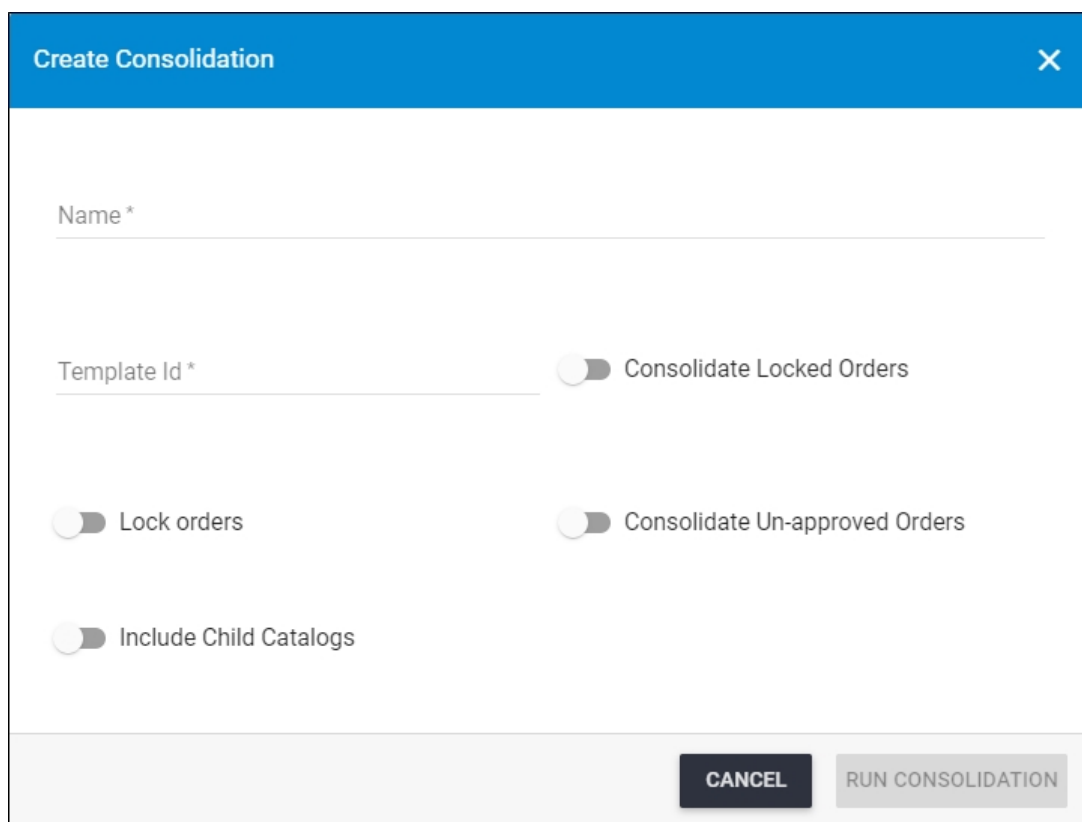


Add consolidation

To add a consolidation, follow these steps:



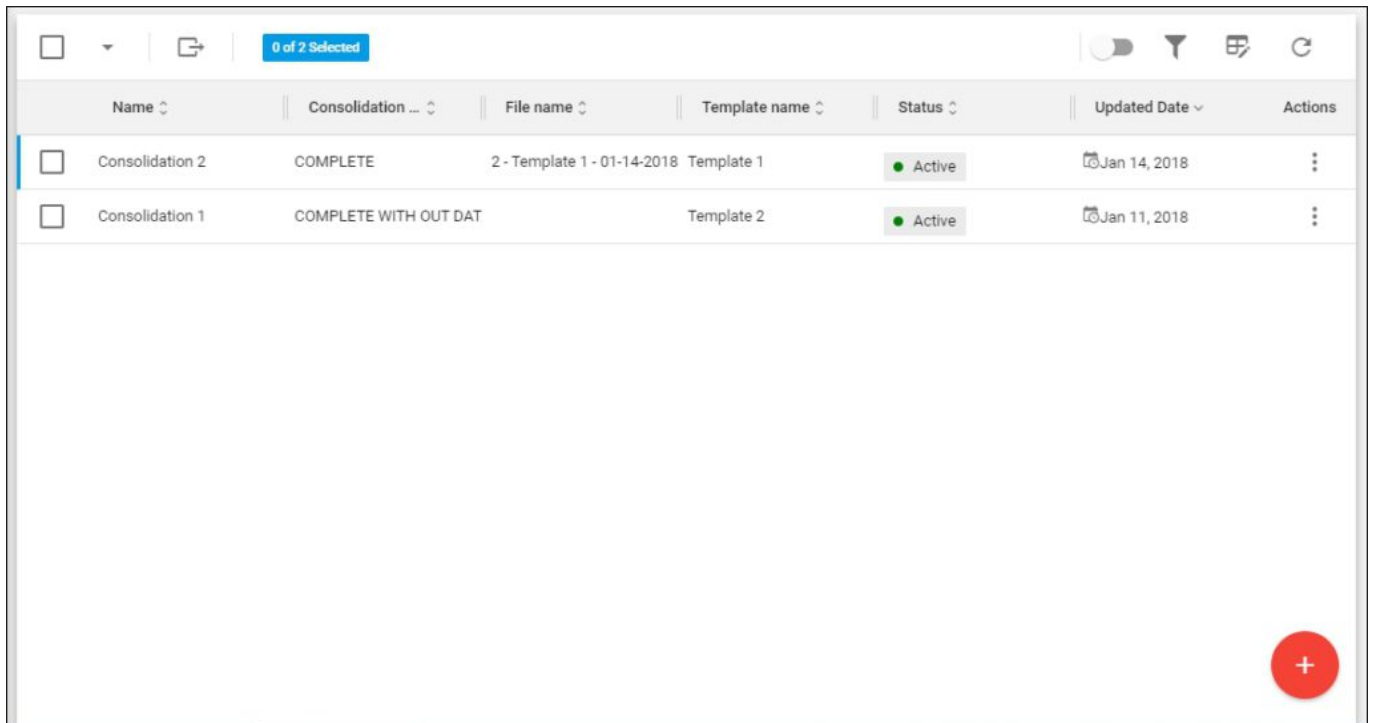
1. Click , the following window appears:

A screenshot of a 'Create Consolidation' dialog box. The dialog has a blue header bar with the title 'Create Consolidation' and a close button (X) on the right. Below the header, there are several input fields and toggle switches. The first field is 'Name *'. The second field is 'Template Id *'. To the right of the 'Template Id *' field is a toggle switch labeled 'Consolidate Locked Orders'. Below these are three more toggle switches: 'Lock orders', 'Consolidate Un-approved Orders', and 'Include Child Catalogs'. At the bottom right of the dialog, there are two buttons: 'CANCEL' and 'RUN CONSOLIDATION'.

2. Enter the name of the consolidation,
3. Select the template Id from its field, this list contains all the active consolidation templates defined for this catalog,
4. Select whether you want to consolidate the locked orders, if this slider is selected, the Lock orders and Consolidate Un-approved Orders sliders are automatically turned off,
5. Click the slider button next to Lock orders if you want to lock order lines automatically once the consolidation is created, so that they cannot be consolidated again,
6. Click the slider button next to Consolidate Un-approved Orders if you want to include the unapproved orders in the consolidation,
7. Click the slider button next to Include Child Catalogs if you want to include the orders

of inherited catalogs in the master catalog consolidation,

8. Click **Run Consolidation**, the consolidation is added to the list with the status “New”,
9. Wait until the consolidation report is created, and its status changes to “Complete” as shown in the below example:



Name	Consolidation ...	File name	Template name	Status	Updated Date	Actions
Consolidation 2	COMPLETE	2 - Template 1 - 01-14-2018	Template 1	Active	Jan 14, 2018	
Consolidation 1	COMPLETE WITH OUT DAT		Template 2	Active	Jan 11, 2018	

The file name is displayed. You can view the consolidation details and file, and rerun the consolidation as discussed in the following section.

Notes:

- If the slider button next to Consolidate Un-approved Orders is activated, the consolidation will include orders with statuses “Submitted”, “Rejected”, “Approved”, “Locked”, “Confirmed”, and “Allocation Failed”.
- If the slider button next to Consolidate Un-approved Orders is not activated, the consolidation will include orders with statuses “Approved”, “Locked”, and “Confirmed”.