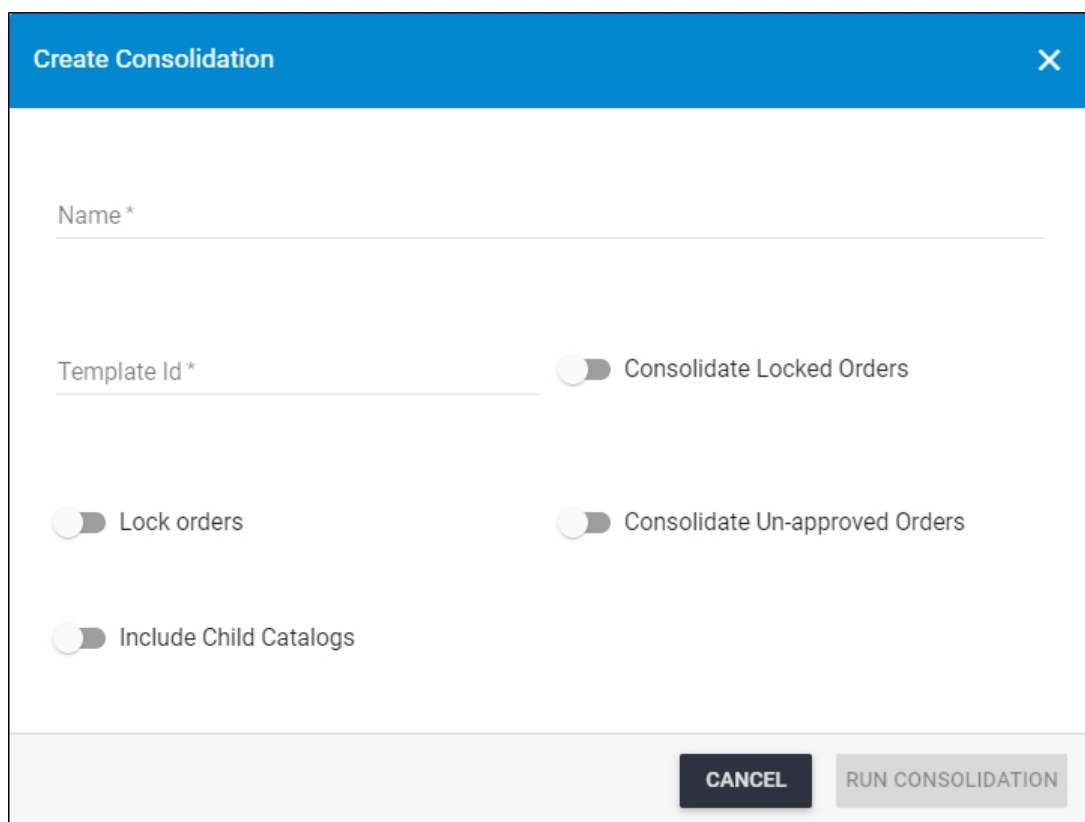


Add consolidation

To add a consolidation, follow these steps:

1. Click , the following window appears:



Create Consolidation ×

Name *

Template Id * Consolidate Locked Orders

Lock orders Consolidate Un-approved Orders

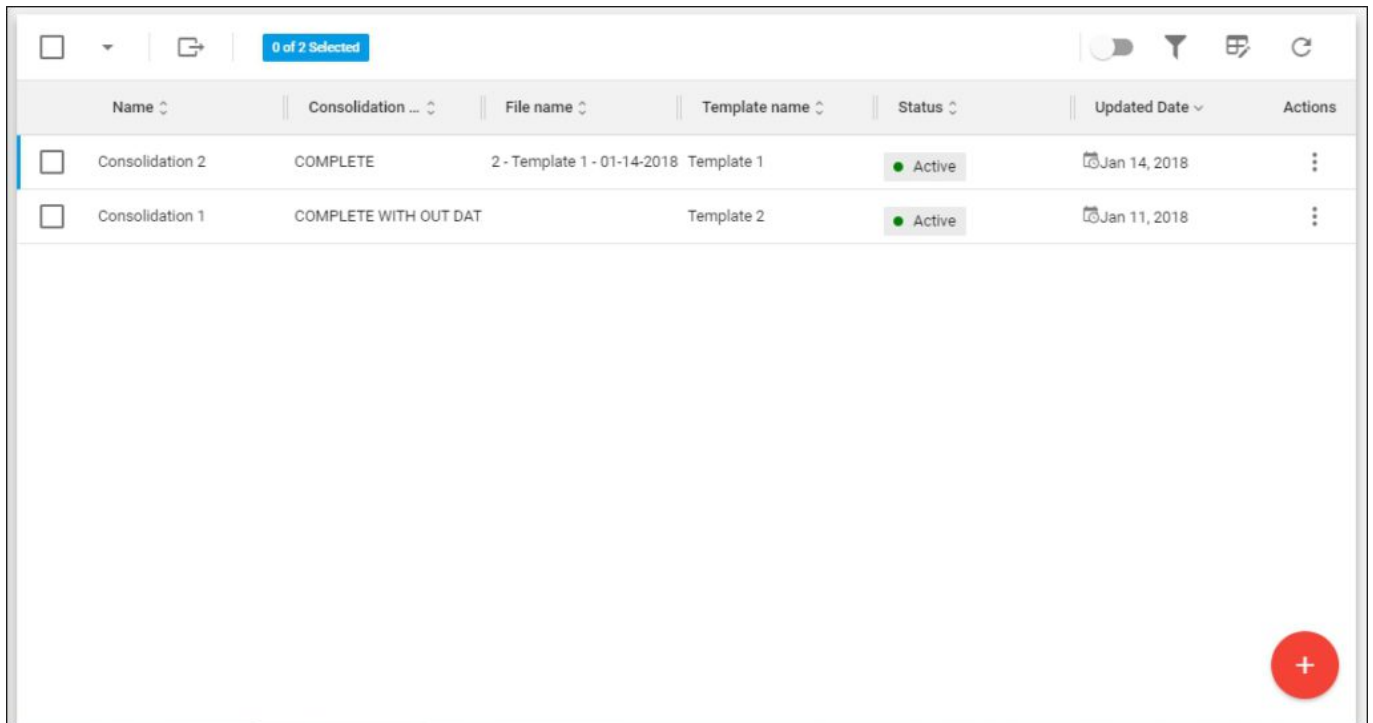
Include Child Catalogs

CANCEL **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:



The screenshot shows a web interface for managing consolidations. At the top, there is a header with a search icon, a refresh icon, and a status indicator '0 of 2 Selected'. Below the header is a table with the following columns: Name, Consolidation, File name, Template name, Status, Updated Date, and Actions. Two rows of data are visible:

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	⋮

A red circular button with a white plus sign is located in the bottom right corner of the interface.

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”.