Summary

Some states require that customers remit deposits for recyclable containers (e.g. bottles and cans) during the sales process. We can use the Finalizer to streamline this process and handle this very much in the same way they do keg deposits.

Prerequisites:

- You need to have a non-inventory sales item setup for each of the variations of bottles/cans you sell with the corresponding price (i.e. $0.5 for single cans, $1.20 for a 24-pack case, etc.)

Step-by-step guide

This first step is to allow a business partner to be marked as exempted from this deposit.

1. From the top file menu, go to Tools>Customization Tools>User-Defined Fields - Management
2. Drill down to Master Data->Business Partner->Business Partner and then click Add
3. Match the parameters to the following screen shot (the Title of the UDF can be changed, however it Title will need to match a column in a proceeding setup step):
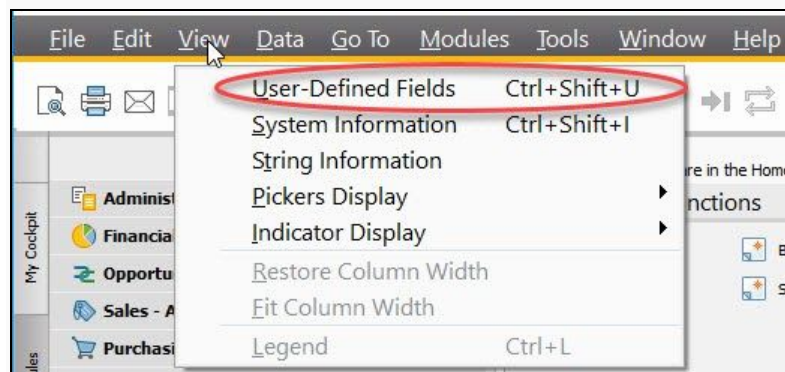
This will set every business partner to default to Yes. You can change a business partner to No in the BP Master Data (Business Partner->Business Partner Master Data) in the UDF window. To set User Defined Fields as visible, from the top menu bar select View > User-Defined Fields :

Now we need to setup the finalizer tables.

Just a note that the naming convention (e.g. Code and Name) can be changed to more accurately match the customers' process as needed.
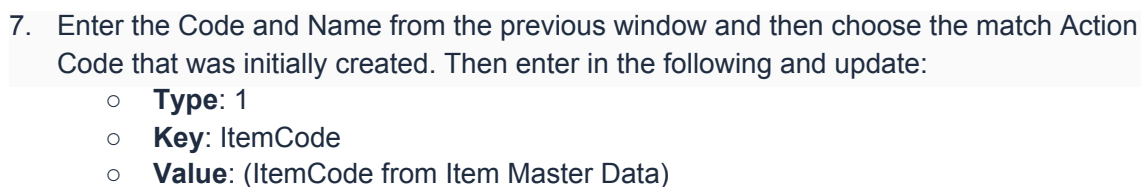
1. Go to Tools->User-Defined Windows->ORC_FINALIZE_ACTION

2. Enter in the desired Code and Name, then type in {139|140|133|179} in the Affected Forms column and click Update

3. Next, go to Tools->User-Defined Windows->ORC_FINALIZE_CONDITIONS
4. Create two new rows with a variation in the Code and Name to match the sequence in the suffix (e.g. XXX-01 and XXX-02) and choose the match Action Code that was previously created. Then enter in the following and update:
    ○ First Item:
        ■ **Type**: 26
        ■ **Prop Source**: 3
        ■ **Property**: U_ORC_BE_PACK_TYPE
        ■ **Ref Value**: (This will be related pack types that need a deposit charged when sold using the following format: {PackType|PackType2|PackType3|etc.})
        Note: for single, individual Ref Values, do not use "{", "|", "}"
    ○ Second Item:
        ■ **Type**: 1
        ■ **Prop Source**: 4
        ■ **Property**: (The UDF Table we created earlier in the first step)
        ■ **Ref Value**: Y

5.
6. Now, go to Tools->User-Defined Windows->ORC_FINALIZE_EFFECTS

7. Enter the Code and Name from the previous window and then choose the match Action Code that was initially created. Then enter in the following and update:
   - **Type**: 1
   - **Key**: ItemCode
   - **Value**: (ItemCode from Item Master Data)

Now when you click the finalize button, it will look to see if any of the items has a pack type that matches what we inputted in the setup and if so, is the Business Partner applicable to this charge. If yes to both, it will charge the deposit based on the price setup in the item master data.

- If you add more variations of bottles/cans, you will need an update to the finalizer tables.