



## 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.

- From the top file menu, go to Tools>Customization Tools>User-Defined Fields - Management
- Drill down to Master Data->Business Partner->Business Partner and then click Add
- 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):

The screenshot shows the 'User-Defined Fields - Management' window. The table lists various fields, including 'CRVapplicable' which is highlighted. A 'Field Data' dialog box is open, showing the configuration for the 'CRVapplicable' field. The dialog includes fields for Title, Description, Type, Length, Structure, and checkboxes for 'Set Valid Values for Field', 'Set Default Value for Field', and 'Mandatory Field'. The 'Valid Values' table shows two entries: 'Y' for 'Yes' and 'N' for 'No'. The 'Default Value' is set to 'Y'.

Category	Title	Description	Type	Dflt	Mand.	Index	Link
Master Data							
Activities							
Agent Name							
Bin Location							
Blanket Agreement							
Business Partner							
Business Partner	ORC_BE_DefaultGL	Default GL Acct	Alphanumeric (10)				
	ORC_BE_TYPE	Business Partner Type	Alphanumeric (2)				
	ORC_BE_BP_Type	Business Partner Type	Alphanumeric (25)				
	ORC_BE_CntrctBrew	Contract Brewer	Alphanumeric (2)	N			
	ORC_BE_IntSales	Internal Sales Biz Partr	Alphanumeric (2)	N			
	COR_CLOUD_IGNORE	Coresuite Mobile Filter	Alphanumeric (1)	Y			
	CRVapplicable	CRVapplicable	Alphanumeric (1)	Y			
Business Partners - Address							
Conditions							
Campaigns							
Cargo Customs Declaration Num							
Employees							
GL Accounts							
Item Groups							
Items							

Field Data

Title: CRVapplicable Description: CRVapplicable

Type: Alphanumeric Length: 1

Structure: Regular

☒ Set Valid Values for Field

#	Value	Description
1	Y	Yes
2	N	No

☒ Set Default Value for Field

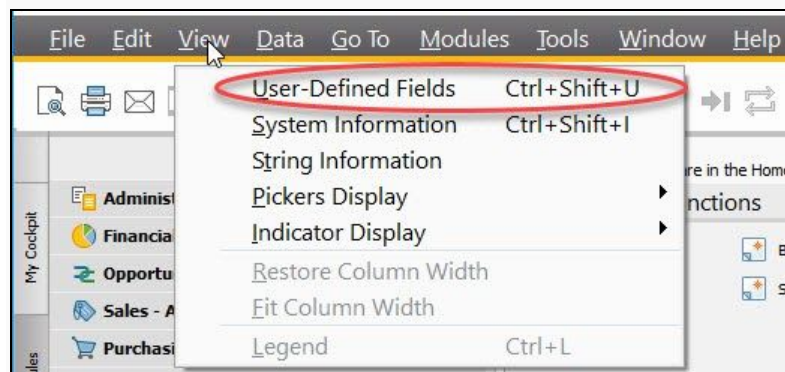
Y

☒ Mandatory Field

OK Cancel



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 :



General	Payment Terms	Payment Run	Accounting	Remarks
Tel 1		Contact Person		
Tel 2		ID No. 2		
Mobile Phone				
Fax				
E-Mail		Remarks		
Web Site				
Shipping Type				
Password				
Factoring Indicator				
BP Project		BP Channel Code		
Industry				
Business Partner Type	Company	Territory		
Alias Name				
		GLN		

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



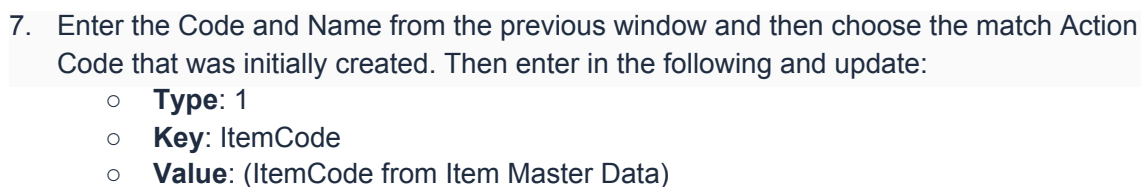
2. Enter in the desired Code and Name, then type in {139|140|133|179} in the Affected Forms column and click Update

#	Code	Name	Affected Forms	Active	Run Last
1	CRV 24 PK (Case)	CRV 24 PK (Case)	{139 140 133 179}	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	CRV 6 -Pack	CRV 6 -Pack	{139 140 133 179}	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	CRV Single Bottle	CRV Single Bottle	{139 140 133 179}	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	K12-Deposit	K12-Deposit	{139 140 133 179}	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	K16-Deposit	K16-Deposit	{139 140 133 179}	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6				<input checked="" type="checkbox"/>	<input type="checkbox"/>

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:
  - o 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 "{", "|", "}"
  - o Second Item:
    - **Type:** 1
    - **Prop Source:** 4
    - **Property:** (The UDF Table we created earlier in the first step)
    - **Ref Value:** Y

#	Code	Name	Action Code	Type	Prop Source	Property	Sub-Property	Ref Value
1	CRV 24 PK (Case)-001	CRV 24 PK (Case)-001	CRV 24 PK (Case)	26	3	U_ORC_BE_PACK_TYPE		{B2412 B2422 C2412}
2	CRV 24 PK (Case)-002	CRV 24 PK (Case)-002	CRV 24 PK (Case)	1	4	U_CRVApplicable		Y
3	CRV 6 -Pack-001	CRV 6 -Pack-001	CRV 6 -Pack	26	3	U_ORC_BE_PACK_TYPE		{B6412 B6750 C612 C6412}
4	CRV 6 -Pack-002	CRV 6 -Pack-002	CRV 6 -Pack	1	4	U_CRVApplicable		Y
5	CRV1003-001	CRV1003-001	CRV Single Bottle	26	3	U_ORC_BE_PACK_TYPE		{SB12 SB22 SB7 SC12 SC16}
6	CRV1003-002	CRV1003-002	CRV Single Bottle	1	4	U_CRVApplicable		Y
7	K12-Deposit	K12-Deposit	K12-Deposit	26	3	U_ORC_BE_PACK_TYPE		K12
8	K16-Deposit	K16-Deposit	K16-Deposit	26	3	U_ORC_BE_PACK_TYPE		K16
9								

- 5.
6. Now, go to Tools->User-Defined Windows->ORC\_FINALIZE\_EFFECTS



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.

- ## Orchestrated Support 4