

Create a New Holding Point

Have the following ready:

- Name of the Holding Point
- Address and contact information

Steps

1. Logon to Panorama
2. Select the **Inventory** tab
3. In the left menu, select **Holding Point Profile** under **Inventory Setup**
4. Search for the holding point to ensure it doesn't exist (when searching, double-check the Organization, search criteria used, etc.)
5. If the holding point does not appear in the search results, click **Create**

Holding Point Profile

6. Identify the **Organization** to which the HP belongs:
 - Click **Find**
 - Start typing the organization name in the **Organization** field
 - Select the organization from the displayed list
 - Click **Select**
7. Select the associated **Service Delivery Location (SDL)**:
 - Click **Find**
 - Start typing the SDL name in the **SDL** field
 - Select the SDL from the displayed list
 - Click **Select**

Note: if the associated SDL does not exist, it will need to be created before the new HP is created

8. Enter the following **HP profile information**: Note – only necessary information is presented in this document; Panorama contains more fields than what is listed
 - **Holding Point Type**: Select from drop-down
 - **Holding Point (HP) Code**: Enter the HP code (usually the name of the HP with “-HP” appended; for Transit points, “-ForPickUp”)
 - **Holding Point Name**: Use the first line to enter HP Name
 - **Holding Point Status**: Leave as Draft
 - **Effective Status Begin Date**: Enter today's date
 - **Effective Status End Date**: Leave blank
 - **Default Replenishment Source**: Select from the list of HPs that are Replenishment Centres (where the HP will place its orders)
 - Select the **Default Incoming Delivery Frequency** = Select Daily
 - **Default Incoming Delivery Frequency Date**: <automatically populated by system>
 - **Preferred Delivery Method**: Select from drop-down

- **Transit Point:** if applicable, select from drop-down of available Transit Points
- Identify **System Inventory Control:** 'None' for External HPs; 'Perpetual' for new Internal HPs

9. At this point, click **Save** – Holding Point will be in Draft status

Holding Point Product Profile

10. Adding products to the Holding Point Product Profile is completed via the **Order Set** function. Click **Order Set** in the left menu
11. Select the order set from the **Order Set Name** drop-down, then click **Search**
12. From the search results, select the Order Set and click **Update Order Set**
13. Go down to the Holding Point section and click **Add Holding Point**
14. Search for the Holding Point that you just saved in **Draft** – select **Draft** in **Holding Point Status**
15. Once found, select the new Holding Point you created and click **Add Holding Points** – your new HP has been added
16. Click **Save**

Holding Point Address(es)

17. Go back to the Holding Point Profile screen to update the rest of your HP profile
18. Scroll to the Holding Point Address(es) section and click **Add New Address**
Note: All Holding Points must have at least 1 default Legal address, 1 default Pay-to/business office address, and 1 Ship-from/return-to address
19. Select the **Address Type** and complete the address information (mandatory fields marked by a red asterisk)
 - When completing the City/Province fields, selecting the Province first to narrow down the cities in the City drop-down
 - Check off **Default**
 - Click **Save Address**
20. If the other two addresses are the same as the address that was just created, use the **Copy Address** function
 - Add checkmark beside existing address
 - Click **Copy Address**
 - Select the next **Address Type**
 - Check off **Default**
 - Click **Save Address**

Holding Point Address(es)

21. Scroll to the **Holding Point Contact(s)** section
Note: Each Holding Point Address must have a default Contact specified

22. Select the **Address** to which a contact will be associated and click the **Add New Contact** button
23. Complete the contact information (mandatory fields marked by a red asterisk)
 - Check off **Default Contact**
 - Click **Save Contact**
24. If the Contact is the same for the other two addresses, use the **Copy Contact** function:
 - Add checkmark beside the next address associated with the contact
 - Add checkmark beside the contact that was just created
 - Click **Copy Contact**
 - Ensure the **Default** field is checked off
 - Click **Save Contact**
25. Click **Save** at the bottom of the Holding Point Profile screen to save all information completed to this point. HP status is still Draft.

Change Status to Active

26. When all information is complete, scroll up to the **Holding Point Status** field and select **Active**
27. **Save** the Holding Point Profile.