



ATG WEB COMMERCE

Commerce Service Center

Version 10.2

User Guide

**Oracle ATG
One Main Street
Cambridge, MA 02142
USA**

ATG Commerce Service Center User Guide

Product version: 10.2

Release date: 04-30-13

Document identifier: CSCUserGuide1403311801

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1 Introduction

Oracle ATG Web Commerce Service Center is a customizable and deployable customer service application that enables an agent to perform the following tasks for a Oracle ATG Web Commerce site:

- Create and manage customer profiles
- Create and manage orders
- Issue refunds and exchanges
- Process returned items
- Research customer activity

For information about Commerce, see the *ATG Commerce Guide to Setting Up a Store* and the *ATG Commerce Programming Guide*.

Audience

This manual is intended for:

- Call Center Agents – People who handle telephone, e-mail or chat interactions with customers with the intent of answering questions, resolving issues and completing tasks for or with the customer
- Agent Supervisors – Individuals who have the same responsibilities as Call Center Agents, but who also are responsible for addressing escalations, dealing with resolution management and monitoring and guiding other Agents
- Call Center Managers – Individuals who are responsible for the activities of all Agents

Documentation Conventions

The following conventions are used in this manual:

- Installation Directory

<ATG10dir>—The directory where you installed ATG 10. For example, the default location for UNIX installations is /ATG/ATG10.2.

-
- Menu Navigation

The “>” (greater than) symbol indicates menu choices. For example, “File > Save” means you should select the Save option on the File menu.

Related Documents

The following manuals provide additional information to information that is presented within this guide:

Guide Title	Description
<i>ATG Ticketing User Guide</i>	Describes ATG Ticketing, including how to create, manage and work on tickets. Intended for customer service representatives, service managers and site administrators.
<i>ATG Content Administration Guide for Business Users</i>	Describes how to use the Business Control Center to create and manage Web site assets for ATG Content Administration. Intended for content developers and editors.

The following manuals provide additional reference information:

Guide Title	Description
<i>ATG Commerce Guide to Setting Up a Store</i>	Describes how to configure and setup Commerce in a retail environment. Intended for business users and page developers.
<i>ATG Personalization Guide for Business Users</i>	Designed to help business users understand and work with the ATG Personalization and the Scenarios modules. Describes how to use the ATG Control Center (ACC) to perform typical tasks such as segmenting site visitors, defining rules for personalizing site content, and using scenarios to create promotional campaigns.

Before You Begin

Before using Commerce Service Center, contact your Site Administrator to verify that you have the following access rights:

- Access rights to Commerce Service Center
- Access to each of the Commerce Service Center databases

Browser and Environment Requirements

For information about the supported browsers, environments, and configurations, refer to the Oracle ATG Commerce Supported Environments Matrix document in the My Oracle Support knowledge base.

2 Using Commerce Service Center

Commerce Service Center allows you to assist customers with their online orders, manage customer information and perform a variety of actions to orders.

This section contains information on the tasks that you can perform using a default configuration of Commerce Service Center.

Accessing Commerce Service Center

Before logging in to Commerce Service Center, you must have a user account and password. Check with your systems administrator for your login information. However, a sample account is provided with Commerce Service Center for evaluation and demonstration purposes. If this account is configured, entering `csr` in both the username and password fields will enable login.

You can access Commerce Service Center with the following URL:

```
http://hostname:port/agent
```

The *hostname* is the name of the machine on which Commerce Service Center is running. The *port* is the port number that your application server uses to listen for requests. For example:

```
http://www.mynewstore.com:8080/agent
```

Note: The Commerce Service Center URL varies depending on your specific configuration; if you are unsure about the URL information, contact your systems administrator.

Logging In

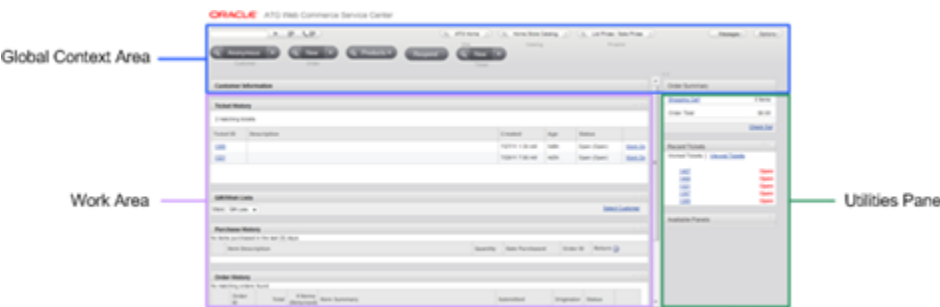
To log in to Commerce Service Center:

1. Open the URL for the Commerce Service Center Login page.
2. Enter your login in the Username field. Note that the Username field is case sensitive.
3. Enter your password in the Password field. Note that the Password field is case sensitive.
4. Click the Login button.

Using Commerce Service Center

The Commerce Service Center page is divided into three sections:

- Global Context Area - The global context area appears at the top of the page, and contains information on current customers, orders, and ticket. It also allows you to save and delete orders and to save tickets
- Work Area - This region displays panels that group similar tasks
- Utilities Window – This window contains various tools that become available based on the task you are performing



Commerce Service Center Layout

The workspace area contains pages that are associated with tasks you perform:

Page	Description
Customer	Use this page to work with customer profiles. A customer profile is a summary of a customer's login, billing, and address information. It also includes information about the customer's activity on your site, such as the customer's ticket history, order history and scheduled orders information.
Order	The Order page is where you create and modify orders and view the product catalogs.
Tickets	The Ticketing task area provides you with the ability to track customer and agent activities. Most of the tasks initiated in this area launch the Ticketing UI, which provides tools for viewing, editing, and managing tickets. The Ticketing UI is described in the <i>ATG Ticketing User Guide</i> .
Respond	The Respond page allows you to communicate with others through e-mail.

Navigating Commerce Service Center

There are several ways to navigate through Commerce Service Center. This includes using the keyboard, using the tab key, using the mouse and using menus.

Using the Keyboard

Commerce Service Center contains keyboard shortcuts that enable you to move quickly throughout the application. Refer to the Utilities > Shortcuts menu for a list of all the possible keyboard shortcuts.

In addition to shortcuts that navigate to specific pages or areas, there are also shortcuts that navigate relative to your current location.

- You can navigate forward and backward through the title bar, global context area, pages, and the content areas using the `CTRL+ .` and `CTRL+ ,` keys
- You can navigate forward and backward through the panels using the `ALT+ .` and `ALT+ ,` keys. Navigating this way will automatically move from the last next steps panel to the first workspace panel when moving forward (or vice versa when moving backwards)
- The Up and Down arrow keys navigate between sub-menu options. The left and right arrow keys navigate between the main menu options
- The Enter key provides a sub-menu option. The Esc key navigates away from a sub-menu back to a main menu

Note: Using the Esc key is the only way to return from a sub-menu to a main menu

Navigating Catalogs

The Product Catalog is divided into categories that are displayed in a tree format. Clicking the + sign will display the information below the item, while selecting the – sign will collapse the information.

Using the Tab Key

When you use the tab key, the screen will show the current location of the cursor as you tab throughout the application. Whenever your cursor lands on an element, a small dotted border appears around object and then fades half a second later to identify the element that has the current focus.

Using the Order Summary Panel

The Order Summary panel is designed to help guide you through the activities that must be completed to create or modify an order, as well as providing a means of navigation to those activities. You can use the Order Summary panel to modify the shopping cart, shipping address, shipping method, billing, or scheduling of an order, as well as to manage returns and exchanges.

Working with Calls

When working in Commerce Service Center, you can take calls from customers who need assistance with their orders. Use the Start Call button located on the global context area to start the call. The Start Call button clears all global context items, such as the current ticket or current customer. Then the Start Call button will populate the global context area with a new ticket order, and customer, as well as start a time to track the length of the call. When you are working with the customer, you can also create call notes, or order notes by selecting the appropriate icon.

When you have completed the call, you can end the call by clicking on either the End Call button, or the End Call and Start New Call button. The End Call button stops the timer and records the length of the call.

Calling with Oracle Click-to-Call On Demand

If you have the optional Oracle Click-to-Call On Demand software, customer calls may be routed to you automatically. Depending on the configuration of your system, the phone number of the customer may be entered automatically into the call field. If not, enter the number of the customer and click the call button.

Once you have entered the customer's phone number, Commerce Service Center will clear all global context items, such as the current ticket or current customer. Then Commerce Service Center will populate the global

context area with a new ticket, the current customer order, and the current customer profile. If no order exists, a new order will be created. If no customer information is available, a new customer will be created.

To end a call that was initiated with Click-to-Call, click the End Call button. Once the call is ended, you can finish up a ticket or begin a new call.

If the customer's number or information is not found, you will be presented with an error. Re-enter the number or verify that the number or information is correct.

If you are using Click-to-Call, or other Live Help On Demand features, refer to your Life Help On Demand documentation.

Logging Out

Before logging out of Commerce Service Center you should complete all current activity. If you log out, while you have an open current ticket, you will be prompted to change the ticket's state.

Note: As a security measure, Commerce Service Center automatically logs you out if it detects no activity for a significant amount of time.

To log out, click the Logout button on the top navigation bar. Commerce Service Center displays the Logout page, which prompts you for confirmation. Click the Logout button on this page to complete logging out.

Working with Optional Multiple Sites

Note: To use any of the following features, your environment must be configured to use multiple sites.

Commerce Service Center supports the optional creation and management of multiple sites. If your environment has been configured to use multiple sites, site components and properties will be available using the site picker that is found throughout the Commerce Service Center interface. By using the drop down menu for Sites, you can select sites that have been configured for your environment.

When your administrator configures sites, they configure the following site properties:

- How the sites will be displayed
- What components will be shared between sites
- The default catalog, price list, and sales price lists
- The site icon for the site

Once your administrator has configured a site, the site is known as an *enabled* and *registered* site, and is accessible in Commerce Service Center.

Sharing within Sites

Sites can share specified objects. For example, sites can be configured to share shopping carts. Sites that share a shopping cart are identified in a *Site Group* that contains the shopping cart *Shareable*.

A site group provides Commerce Service Center with a way to reference a number of sites. Site groups can be configured to contain shareables. Shareables are components or properties that are shared across defined sites (contained within a site group). Your administrator configures the site groups and the shareables used by these site groups. When a site group contains shareable items, the site group is also known as a *sharing group*. Note that there may be multiple sites available when you are working with catalogs, price lists and sales price lists.

Sites within a site group may share the same *profile realm*. A profile realm allows site developers to provide specified groups of external users to see given sites within a group. External user profiles can access all sites that are members of the site's realm. For additional information on sites and site configuration, refer to the *ATG Multisite Administration Guide*.

When you log into Commerce Service Center, you will be using the default site, which includes a default price list, a default sales list and a default catalog. However, you can change from the default site to another using the site picker. As you change sites, the context of the site changes. When a site's context changes, you may see different information on the screen, and the availability of items such as products, SKUs, catalogs and price lists, may change.

Navigating Between Sites

The site picker displays different information depending on the configuration of your environment. The header on the Commerce page displays drop down menus that show the name of the current site and current price and sales lists, if enabled. The site picker also displays the current catalog.

If there are multiple sites, the site picker can be used to select other sites, catalogs or price and sales lists by using the drop down menus. Clicking Select another Site from the Site drop down menu opens the site picker window, allowing you to review and select available sites and site groups.

When you are working with catalogs and price lists, be aware that functionality may vary based upon the way that these components are set up by your administrator.

3 Working With Customers

Commerce Service Center enables you to create new customer profiles, and to edit existing customer profiles. In this section you can learn how to manage customer information.

This section primarily describes how to perform these activities through the Customers task area. Many of these tasks can also be performed during the process of creating an order. For example, if you submit an order for a new customer, you can create a customer profile from the information you record when you create the order. If an existing customer uses a new credit card or shipping address, you can add the card or address to the customer's profile.

Working with Existing Customers

When you want to work with an existing customer, you can search for the customer using a number of different criteria. Once you have found the customer, before you can work with the customer profile, you must make the customer the *active* customer. The customer is active when the customer name appears in the global context area.

Note: If the existing customer has Commerce B2B information, the B2B properties will not be displayed.

You can work with customers using the Customers page.

Searching For Customers

To search for a customer:

1. Select the Customers page or select the search icon on the Customer button.
2. In the Customer Search panel, enter the search criteria, such as a first or last name, a phone number or a log in name.
3. Click Search.

The system returns a list of customers with names that match the full or partial name you provided. Use the arrows to move through the pages of the search results. You can click on any of the column headings to sort the results.

4. To make the customer active, click the Select link. Subsequent actions you perform (such as creating an order) will use this customer's profile.

The customer name will appear in the global context area of the page header, and a message will appear in the Messaging area, indicating that the customer is the active customer.

You can also search for customers when working in the Shopping Cart page by clicking the Select Customer link. This will display a Customer Search panel that you can use to associate a customer with an order.

Changing Customer Passwords

You can change the password for a customer at any time. This is useful when the customer feels that the security of the current password is in jeopardy, or the customer cannot remember the current password.

To change a customer's password:

1. Activate the customer as outlined in [Searching For Customers \(page 11\)](#).
2. Click the customer's name in the global context area. This brings up the customer's profile page.
3. Click the Email New Password link. The system will generate a new password and e-mail it to the customer at the e-mail address provided.
4. A message will appear identifying that a new password has been generated and that the new password will be sent.

Managing Addresses

A customer can have several different addresses within his or her customer profile. Addresses can be regular addresses or electronic addresses, such as e-mail addresses. Note that not all items within an order can be shipped to an electronic address. The order item will indicate the methods available for shipping.

Adding an Address

1. Activate the customer as outlined in [Searching For Customers \(page 11\)](#).
2. Click the customer's name in the global context area. This brings up the customer's profile page.
3. Click the Add a Destination link.
4. Enter the information for the new address.
5. To make this address the customer's default shipping address, select the checkbox labeled Make Default Shipping Address.
6. To make this address the customer's default billing address, select the checkbox labeled Make Default Billing Address..
7. Click Save to create the new address. The address will appear in the Address section of the Customer Management page. The S and B icons indicate that this is the default Shipping and/or default Billing address

Editing an Address

You can edit a shipping address in a customer's address book at any time. When you do so, Commerce Service Center saves the changes in the customer's address book. However, the changes are not applied to existing orders.

To edit an address in an address book:

-
1. Activate the customer as outlined in [Searching For Customers \(page 11\)](#).
 2. Click the customer's name in the global context area. This brings up the customer's profile page.
 3. From the address you wish to edit, click the Edit icon.
 4. Edit the address.
 5. Click Save.

Deleting an Address

When you delete an address from a customer's address book, the system removes the address only from the address book. All existing orders remain unchanged.

To delete an address from an address book:

1. Activate the customer as outlined in [Searching For Customers \(page 11\)](#).
2. Click the customer's name in the global context area. This brings up the customer's profile page.
3. From the address you wish to delete, click the Delete icon.
4. When the system asks if you want to delete the address, click Delete. The address is deleted.

Note: No Delete Address button appears next to the default shipping address or billing address. You can modify a default address, but you cannot delete it directly. To delete a default address, first make a different address the new default and then delete the old default.

Managing Credit Cards

A customer can have any number of credit cards in his or her customer profile, and you can use these credit cards to place orders for the customer in Commerce Service Center.

Adding a Credit Card

1. Activate the customer as outlined in [Searching For Customers \(page 11\)](#).
2. Click the customer's name in the global context area. This brings up the customer's profile page.
3. Click the Add New Credit Card link.

The system displays the Add Credit Card page.

4. Enter the credit card information.
5. To make this card the default credit card, select the Make Default Credit Card check box.
6. Add the billing address information by selecting an existing billing address, or entering a new one.
7. Click Save. The credit card is added to the Customer profile.

Editing a Credit Card

When you edit a credit card in a customer's credit card list, the system applies the changes to only the credit card listing. All existing orders remain unchanged.

To edit a credit card in a customer's credit card list:

-
1. Activate the customer as outlined in [Searching For Customers \(page 11\)](#).
 2. Click the customer's name in the global context area. This brings up the customer's profile page.
 3. Select the credit card to edit and click the edit icon.
 4. Edit the credit card information.
 5. Click Save to save your changes.

Deleting a Credit Card

When you delete a credit card from a customer's credit card list, the system deletes the card from only the credit card list. All existing orders remain unchanged.

To delete a credit card:

1. Activate the customer as outlined in [Searching For Customers \(page 11\)](#).
2. Click the customer's name in the global context area. This brings up the customer's profile page.
3. Select the credit card to delete and click the delete icon.
4. When the system asks if you want to delete the credit card, click Delete.
5. The credit card information is removed from the customer profile.

Issuing a Store Credit

You can provide a store credit to a customer by entering a credit amount and an explanation of the credit. Once the credit has been added to the customer's profile, it cannot be edited. By default, the store credit will be used whenever the customer creates an order. However, if the customer has multiple store credits, you can identify which credit to use by using the redemption code for the store credit.

Researching Customer Activity

Each customer in Commerce Service Center has a series of customer logs that store information about the customer's activities on your site. For example, each time a customer submits an order, Commerce Service Center automatically records the activity in the customer's Order History log. At any time, you can research a customer's activities using these logs and then use the information to assist customers with requests and questions.

Accessing a Customer's Order History

The Order History includes a complete list of all of the customer's orders. Using the Order History you can quickly locate an order for a customer.

To access a customer's Order History:

1. Activate the customer as outlined in [Searching For Customers \(page 11\)](#).
2. Click the customer's name in the global context area. This brings up the customer's profile page.
3. Scroll to the Order History section of the customer's profile page.
4. You can click on an order number to view the order's details.

Accessing a Customer's Comments

At any time, you can access a list of comments that have been associated to a customer.

You can also attach comments to individual orders. However, these comments are stored in the order; they are not stored in the customer's Comments log.

To access a customer's notes:

1. Activate the customer as outlined in [Searching For Customers \(page 11\)](#).
2. Click the customer's name in the global context area. This brings up the customer's profile page.
3. Scroll to the Notes section of the page.

For information on how to access the comments in an order, see [Searching For and Displaying Orders \(page 33\)](#).

Working with Customer Gift and Wish Lists

Commerce allows registered customers to create gift lists and a wish list. If necessary, you can use Commerce Service Center to assist them in the creation and management of these lists:

- **Gift Lists** – A list of items that a customer selects so that other customers may purchase the items. This list defines specific items, and optionally shipping information for the gift list creator. gift lists can be public or private. Public lists are included in all gift list searches, and items on the public list can be purchased by people in addition to the owner of the gift list. Private lists are available only to the owner of the list and are usually used when compiling a list before making the list public
- **Wish Lists** – A list of items that the customer selects that can be purchased later. This list is not public, so other customers cannot purchase items from a wish list

When assisting customers with gift and wish lists, you can:

- Search for another person's gift list and add list items to the customer's shopping cart
- Create, edit, or delete the customer's gift list
- Edit or generate an order from the customer's wish list

Note: If a customer returns an item that was purchased using a gift list, the gift list will not be updated with the return information.

You can search for existing gift lists by accessing the Commerce page and using the Product pull down menu to select Search for Gift Lists. If you know the name of the customer who created the gift list, you can use their customer profile to access the gift list.

Searching for a Gift List

You can search for a gift list and add items from that gift list to the cart. Alternatively, you can navigate to a Customer page, locate a gift list on the new Gift / Wish List tab, and navigate from that list to the View Gift List tab on the Gift List page and add items to the cart.

You can search for a gift list by entering the customer name, the event name's list type, and/or the date of the event:

1. From the Orders button, select the Search for Gift List menu item. The Search Gift List panel appears.
2. Enter at least one field to search for a gift list.
3. Click Search to see the results.
4. When you select one of the gift lists, the gift list is displayed in the View Gift List panel.
5. When you view the gift list, there is a link to each item to view additional information, if necessary.

Note: If your configuration has multiple sites, only items from your current cart sharing group can be added to the shopping cart. Items that are not in the current cart sharing group will be grayed-out and you will have to change the site context before you can add the items to the shopping cart.

Creating a Gift List

Gift lists are created within the customer profile in the Customer panel. Gift lists can be created, edited, and deleted.

1. Open the customer profile of the active customer in the Customer panel. The active customer is identified as active by being listed in the global context area.
2. Scroll down to the Gift/Wish List panel.
3. Use the View drop down menu to select Gift Lists.
4. Click the Create New Gift List link to access the Create Gift List panel.
5. Enter the customer information.

Note: The fields that you see may differ than the one in this example as your system administrator may have modified the form, or you may not be using multiple sites. When creating a gift list, if using Multisite, the list will default to the current site. This can be changed to other sites only when creating the gift list and not while editing the gift list.

6. When you have completed entering the information, click OK to save the new gift list.

The gift list will now be available on the customer's profile. If the gift list is a public list, the list will also be available to other customers.

Adding Items to a Gift List

Once the gift list has been created, both you and the customer may add items to the gift list by accessing the product pages, selecting both an item and a gift list and then clicking Add to Gift List.

Note: With Commerce Service Center, you cannot add a product directly into the gift list from a cross sell list. You must follow the product name link to either the Product page or the Add Products pop-up to add to a list.

You can add products to a gift list from the product page only when the customer is a registered customer and they have an existing valid gift list. Once items are added to the gift list, the information appears in the customer profile's Gift List section.

Updating a Gift List

You can change quantities, delete items, or update customer information for the gift list.

To edit a gift list:

1. Select and view the gift list.
2. Click Edit Gift List Details to access the gift list information.
3. Change the information as necessary.

Deleting a Gift List

You can delete gift lists for customers at their request:

1. Use the customer panel to access their gift lists.
2. Select the delete icon associated with the event to delete the gift list.
3. You will be asked if you want to delete the gift list.

If you click Yes, the gift list will be permanently deleted.

Creating a Wish List

A customer can create only one wish list. The information in the wish list is not shared with other customers. Once an item is added to a wish list, either you or the customer can add it to the current order.

If you are using Multisite, based upon configuration, you may only see the products in the wish list that are associated with the current site or the current sharing group. To see the other items in a wish list, you must select the appropriate site from the Commerce panel.

You can create wish lists two different ways. The fastest way is to add items directly from the product catalog:

1. Ensure that the current customer is the active customer. You will see their name in the global context area.
2. Open a catalog and select items.
3. When you open an item, you will see the Add to Wish List button.
4. Click Add to Wish List. The item will be added to the customer's wish list.

Note: Unlike gift lists, you can always add an item to a registered customer's wish list. To add an item to a gift list, the customer must have a valid active gift list.

You can also create a wish list by accessing the customer profile of the customer and use the Gift/Wish List drop down menu. If there is nothing in the wish list, you will be prompted to select a product catalog to enter items.

Once items have been added to the wish list, the wish list will be displayed on the customer profile in the Gift/Wish List panel.

Adding Wish List Items to the Order

1. Open the customer profile of the active customer in the Customer panel. The active customer is identified as active by being listed in the global context area.

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2. Scroll down to the Gift/Wish List panel.
 3. Use the View drop down menu to select Wish Lists.
 4. Click the Add to Cart button of the item to add to the order. The item will be added to the current shopping cart and can be managed as any other order item.

Deleting a Wish List

All registered customers have a wish list and that wish list cannot be deleted. However, you can delete all items from the wish list by using the delete icon associated with the item. Once the items have been removed from the wish list, no wish list settings will appear in the customer profile until new items are added.

Creating a New Customer

When you create a new customer, you create a customer profile, which is a summary of a customer's contact information, default shipping address, and billing address. It also includes information about the customer's activity on your site, such as the customer's order history.

When you create a new customer profile, if you are using multiple sites and profile realms, you must make the new profile while you have the desired site current in the global context area.

To create a new customer profile:

1. Click the Customers button.
2. Use the pop-up menu and select Create New Customer.
3. The system displays the Customer Information page.
4. Add the customer's contact information. Required fields are noted with an asterisk. If you do not click the Create Account check box, a temporary user will be created, but the customer information will not be saved in a permanent account.
5. Click Save. The system responds that the information for the customer has been updated.
6. Once you have saved the customer information, additional panels will become available. Add any additional information to the customer profile, including additional addresses, credit cards, credits or promotions or notes as needed.

4 Working with Orders

This section describes how to work with orders in Commerce Service Center. You can work with orders by accessing the Commerce page and selecting the Orders sub-menu.

Searching for Products

Commerce Service Center allows you to search for products by:

- Product or SKU ID
- Category
- Description
- Using the Product Catalog
- Site

Viewing the Product Catalog

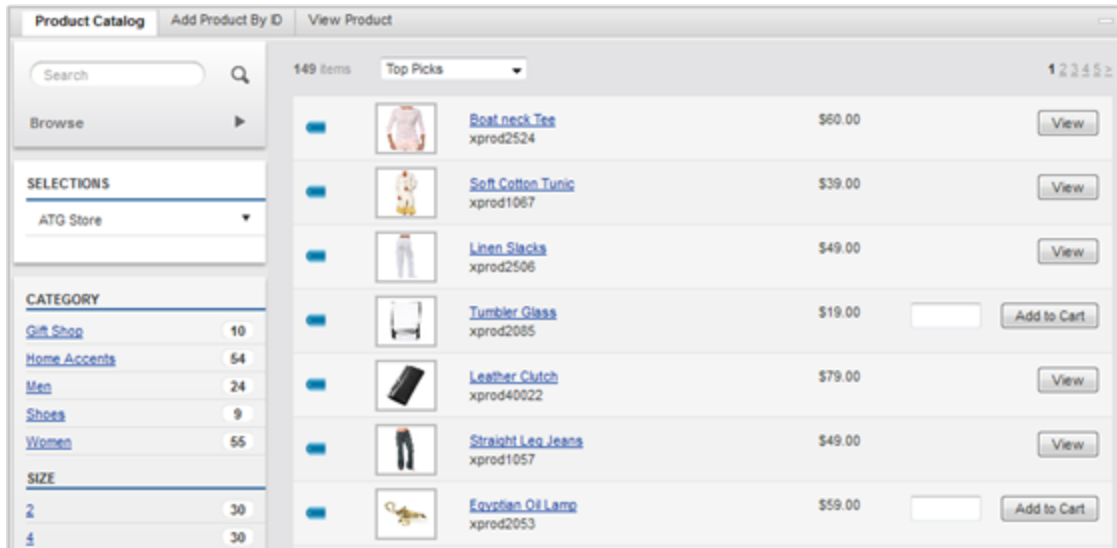
The Product Catalog allows you to select items, and to view items within the catalog.

1. Selecting the Orders button and use the drop down menu to displays the browse or search catalog option.
2. You may search for items by site or by using the complete Product or SKU ID, the category of the item, or a general description.
3. Select the item from the category list. The product information screen will appear.
4. You can review information for the specific items by clicking the review icon.
5. You can add the item to the order by specifying a quantity and clicking Add to Cart. Refer to [Creating Orders \(page 22\)](#) for instructions on creating an entire new order.

Viewing the Product Catalog using Endeca

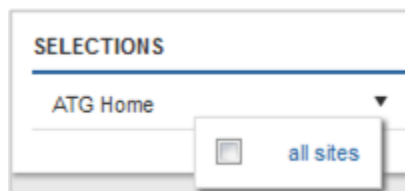
If your environment is set up to use Endeca's search application, your search environment will show different information. To verify if your environment uses the Endeca MDEX Search Engine, contact your system administrator.

When you select the Products button in the global navigation area, select the Product Catalog link. The Search Product Catalog screen is displayed:



This page allows you to enter search criteria, browse through the product catalog, or select facets that have been defined within the catalog. When you use the Endeca-based catalog search, your searches will be the same as the customer's, meaning that you will see the exact information that the customer sees.

By default, the current site is selected in the Selections area. You can use the drop down menu to select all sites, or the current site, based upon the customer's requirements. Selecting All Sites will allow you to search any catalog that is associated with the sites listed, either the default catalog for the site, or the current catalog that you select.



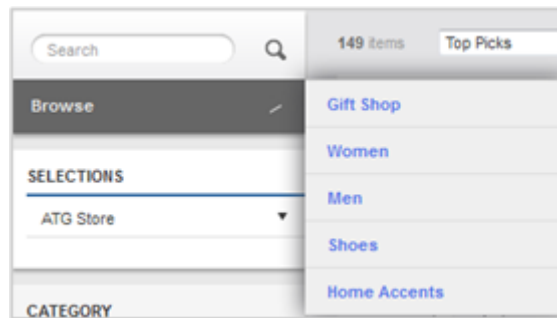
Entering Search Criteria

You can enter search criteria, such as "women", or "blue" or other keywords to assist in the search. If your system has been configured to use auto-suggestions, when you enter a defined number of characters, suggestions will be provided that you can select for quick access:



Using the Browse Menu

You can also search for catalog items using the Browse menu by clicking on the browse arrow. This will display a list of all of the categories that have been defined for the catalog. For example:



Select the category and the results will display in the results screen.

Selecting Items By Facets

The Product Catalog page also displays the facets or *dimensions* that have been defined for the catalog. These are listed on the left of the screen, and provide a number of each item that will be displayed. Dimensions may have been configured to display things like "Brand", "Size", or "Color." You can click on the dimension to see the catalog items within it.

Should there be a large number of dimensions, you may see a [more](#) or [fewer](#) link that, when selected, will expand or collapse the list.

Tracking Your Search

You can follow your search by using the Selections screen. This screen will track the search selections you make, creating "breadcrumbs" for you to follow back. For example, if you selected Women, then Accessories, then Handbags and Wallets, you'd see the screen on the left. If you selected Women, the Dresses and selected size 10 and color Black, you'd see the screen on the right:

SELECTIONS	
ATG Store	▼
Women > Accessories > Handbags and Wallets	X
clear all	

SELECTIONS	
ATG Store	▼
Women > Dresses	X
10	X
Black	X
clear all	

You can clear individual selection criteria by clicking its associated X, or you can clear all of the selections by clicking the Clear All link.

Creating Orders

Click-to-Call Users Note: If you are working with an order from a customer that contacted you through the optional Click-to-Call integration, meaning that you entered, or were routed to, a Click-to-Call phone number, ask the customer to navigate off of the check out pages to ensure that they can continue working on the Website once you have completed your interaction with them. When you modify an order for a Click-to-Call customer, they will encounter synchronization errors if they are still on a check out page.

Note: Commerce Service Center does not support B2B features, such as contracts, organizations, PO payment types, cost centers, B2B approvals or line-level payment types. Nor does it support coupon tracking in returns and exchanges or coupon limits added to an order by agents. Orders that contain B2B features will be viewable, but you will not be able to edit these orders.

A new order is automatically associated with the active customer. When you start a new call, the active customer is Anonymous Profile, which is an anonymous, temporary profile. You can select an existing customer, or you can create the order for the anonymous profile. Refer to [Searching For Customers \(page 11\)](#).

Creating an order involves the following steps:

1. From the Orders button, select the Create New Order menu option.
2. Add items to the order. Refer to [Adding Items to an Order \(page 23\)](#).
3. Review your selections in the Shopping Cart.
4. Specify the shipping information for the order. Refer to [Selecting a Shipping Address for a New Order \(page 26\)](#).
5. Specify the shipping method for the order. Refer to [Entering Shipping Methods \(page 26\)](#).
6. Specify the payment information for the order. Refer to [Adding Payment Information \(page 27\)](#).
7. Submit the order. Refer to [Submitting an Order \(page 27\)](#).

When you create an order, Commerce Service Center automatically applies any available promotions to the order. These promotions may be global promotions applied to all customers, or promotions specific to the customer.

Note: Customer-specific promotions are listed on various pages of the Commerce Service Center, but global promotions will show up only on the checkout pages. For more information about promotions, refer to the *ATG Commerce Guide to Setting Up a Store*.

Adding Items to an Order

Commerce Service Center includes a view of your company's product catalog, which can contain any number of categories, products, and items:

- Categories organize your company's products into logical product groups, such as Bikes and Accessories
- Products represent the actual goods available for sale on your site, such as a mountain bike, a shirt, or a gift certificate
- The items or SKUs (Stock Keeping Units) represent different versions of the same product. For example, a shirt might have several different SKUs associated with it to represent different sizes and colors. When a customer purchases a product, they actually purchase the SKU that represents the product's attributes, such as a red, medium-sized shirt
- Sites, if configured for your environment, will contain specific catalogs or price lists

When you add an item to a new order, you add the SKU number for the item to the order. If you do not know the SKU number for the item, you can conduct a search for the item. Commerce Service Center provides a search feature that allows you to search for the item by site, SKU number, price, category, description, or a combination of these. Note, however, if your site uses price lists, you can select a single price list to be used in the current order for a list of all price lists. If you are working with a site that belongs to a cart sharing group, the price list selection will apply to all sites in the site group.

Note: If your environment is using multiple sites, and you change the site context while working within a cart that is shared between sites, the current order will be re-priced and any items that cannot be priced will be removed from the cart. Changing the site context may also affect promotions that are available. If site context is changed while working within a cart that is not shared with the current site, a new order will be created.

Selecting a Catalog

If your environment has been configured for multiple sites, catalogs will be associated with these sites. Use the Catalog Picker to select the catalog to use for the order. Note that there may be multiple catalogs associated with a shared shopping cart.

1. To select a catalog from the shopping cart site picker, use the drop-down menu to select a catalog. Click the Select Another Catalog link to access the Catalog Picker.
2. Enter a keyword or a start or end date to search for other catalogs.
3. Choose the catalog to use by clicking the Select link and click Close to exit the screen.

Adding Items Using the Product or SKU ID:

1. Open the Customer page. Enter the customer information as outlined in [Working With Customers \(page 11\)](#). Ensure that the customer is active, and is displayed in the page header.

Note: You can continue to create the new order without entering the customer. Some price lists are tied to the customer profile, so you will get the correct list only if you have selected the customer.

2. Open the Order page and select Products. The Product Catalog screen appears.

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3. Click Add Products by ID.
 4. Enter the Product or SKU ID for the item. Note that you must enter the complete Product or SKU ID for the item.
 5. If you entered a Product ID number, a pop-up window appears with the product information. Select the product to add by entering a quantity. Click OK to return to the Add Product by ID page.

The product information will be added to the Add Product by ID page.
 6. To add an item to the order using the SKU number, enter the SKU number and the quantity. The product information will appear on the Add Product by ID page.

Note: If you do not know the SKU number for the item, you can search for the item, as described in [Searching For and Displaying Orders \(page 33\)](#).
 7. Repeat steps 4 through 6 to select additional items to add to the order.

Note: From the New Order page, you can change the quantity for any item in the order or remove items from the order.
 8. Click Add To Cart.
 9. To change the quantity for any item in the order, in the Order Summary section type a new numeric value in the Quantity text box for any SKU and then click the Update Quantities button.
 10. To override an item's cost, enter a new numerical value in the Final Price field that corresponds to the item, and click Update.

Note: You are overriding the cost for the total quantity of the item. For example, if the customer has ordered two identical bikes for \$2,000.00 each, and if you want to offer the bikes for \$1800.00 each, you need to replace the 4000.00 with 3600.00 in the Final Price field for the item.
 11. To remove an item from the order, click the Remove Item button next to the item you want to remove.
 12. When you are done adding items to the order, click Add Shipping Information to specifying the order's shipping information.

Working with Cross-Sell Items

When you create an order, the order contains a Cross-Sell panel that lists all products that have been indicated as cross-sells for any products in the current order. You can use this panel to get additional information on a cross-sell product, or to add the cross-sell product to the order.

If you are using a multisite environment, following a link from a cross-sell item list may change the site context to the site associated with the cross-sell item.

Using In-Store Pickup

Commerce Service Center can be configured to use in-store pickup, which allows the customer to go to a store near them and pickup the merchandise.

When you are working on a product page, if in-store pickup is enabled, you will see the Pickup In-Store button. This button appears for:

- SKUs that have been configured as eligible and are not online-only
- Only one SKU at a time

If the SKU meets the criteria, the In-Store Pickup Locations window will appear. This window allows you to search for stores that are local to the customer that have the requested SKU.

1. Enter the country where the customer would like to pick up the item.
2. Enter either the postal code or the city and state to search.
3. Use the drop-down menu to enter the search radius. For example, entering < 10 miles will search for stores that are less than ten miles from the zip code or city and state you entered. Note that these distances are estimates and apply only to stores local to the postal code or city and state that you've provided.

The search result displays the stores and their inventory of the requested item. If your system has been configured to not use a specific location provider, when you click on Search, all stores and their available inventory will appear.

Note: Some stores may display an ATP date. The ATP date is only informational, you cannot add ATP items to the cart.

4. Select Add to Cart of the desired store. This adds the item to the shopping cart.

Note: When you are working with multiple quantities of the same item, and you select a store that contains less than the total number of the quantities required for the order, you must perform steps 1 through 4 again to add the remaining quantities.

5. A message will be displayed when the item is added to the cart.

Once the SKU is in the shopping cart, it cannot be edited. To make edits, you must return to the product page, make the modifications, and then return to the shopping cart and delete the original entry.

6. When you continue with the order, you can select the stores that are specifically selected for items within this order. If you are shipping to multiple destinations, select the Deliver to Multiple Places link. Items that are part of an In Store Pickup Shipping Group, can be returned if they are not part of a Pay In Store Payment Type.
7. The Shipping Method page displays an Authorized Recipient field. This is the name of the person who is authorized to pick up the item at the store.
8. The Billing page will display the Pay In Store payment type and the amount that will be required when the authorized recipient collects the merchandise. Note that items that have a payment type of Pay In Store will not be available for returns.

Making an Order Adjustment

Use the Add Order Adjustment link to make a manual order price adjustment to the whole order.

1. Select the Add Order Adjustment link.
2. Select a reason for the adjustment.
3. Indicate if the modification is a debit or a credit.
4. Provide the amount the entire order will change.
5. Enter additional notes as necessary.

For example, to provide free shipping to a particular customer, enter the reason as "Shipping", indicate that this is a credit to the account, and then enter the cost of the shipping.

Note: Shipping costs are not calculated in the Shopping Cart, so you will not see a shipping cost after completing the shipping component of the order.

Selecting a Shipping Address for a New Order

Once you have added items to an order and reviewed an order, Commerce Service Center displays the Shipping Information page, where you can specify the shipping address for the order.

If the order contains multiple items, you can ship the order to multiple addresses, as described in [Shipping to Multiple Addresses \(page 26\)](#).

To specify the shipping information for the order:

1. Access the Shipping Address panel using the shopping cart.
2. Do one of the following:
 - If you have an active customer with saved address, select the Deliver to One Place link located above the desired address. This navigates you to the shipping method page
 - If your customer wants to pick up their order at a store, select the store location
 - If you want to associate the order with a shipping address other than one of the displayed addresses, or you do not have an active customer, click the Add a Destination link and enter the address information. You may also use the In Store Pickup button should the customer wish to pick up their merchandise from a local store. Refer to the [Using In-Store Pickup \(page 24\)](#) section for additional information.
3. Continue on to the Shipping Method page.
4. Click Continue to Billing. The system displays the Billing Information page, where you can now add the payment information to the order. See [Adding Payment Information \(page 27\)](#).

Shipping to Multiple Addresses

If the customer's order contains multiple items, you can ship any combination of items to any of the customer's shipping addresses (either the default address or any address in the customer's address book). If you are working with an order that contains gift list items, the shipping address information will indicate both the recipient and the associated gift list.

To ship to multiple shipping addresses:

1. Select Shipping Address from the Order Summary panel from the Shopping Cart.
2. On the Shipping Address page, click Deliver to Multiple Places.
3. For each item in the order, select a shipping address from the Destination drop-down list. The Destination drop-down list contains the customer's default shipping address (listed as My Shipping Address) and all the addresses in the customer's address book. You can enter a new address for shipping by providing the shipping information. The destination can be either a Deliver or Pickup address.

Note: To split the quantity of an item, click Split Quantity, and enter a value in the Qty to Split field for the item, select an address from the drop-down list. The page updates to show two entries for the item, one for each address.

4. Click the Ship to Multiple Places button.

Entering Shipping Methods

Once you have entered the shipping address you must select a shipping method for the order.

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1. For each shipment address, select a shipping method.
 2. Verify that the address and order information are correct. If the order is an In Store Pickup order, the first and last name of the authorized recipient may be required.
 3. Click Continue to Billing to add the payment information to the order. See [Adding Payment Information \(page 27\)](#).

Adding Payment Information

The payment information associated with a new order can include the credit card the customer wants to charge the order to, as well as available store credits and gift certificates.

Note: Commerce Service Center does not support Commerce B2B features. You will not be able to add any B2B payment methods to an order.

You specify the payment information for an order on the Billing page. To specify the payment information:

1. Select Billing by following the checkout process.
2. Do one of the following:
 - If the customer has any gift certificates, or store credits to apply to the order, use the Gift Certificate/Store Credit section to enter the gift certificate, or store credit code into the text box and then click Claim. Repeat the process for each gift certificate, or store credit the customer wants to redeem
 - In the Available Payment Options section, select a payment method, such as credit card, gift certificate, or store credit. You can select Pay In Store payment type if the customer is doing an in-store pickup. The Pay In Store payment must equal the total of all In Store Pickup shipped items.
3. Click Continue to Order Review.

Note: To enter a new payment method, click Add New Payment Method, enter the information, and then click Add to save.

- You can also select a payment group for the order. To add a payment group to the order, the payment group value has to be greater than zero. Payment groups with non-zero amount will be applied to the order

Now you can confirm and submit the order, as described in [Submitting an Order \(page 27\)](#)

Submitting an Order

Note: If you are submitting an order from a customer that contacted you with the optional Click-to-Call integration, meaning that you entered, or were routed to, a phone number from a Click-to-Call customer, ensure that the customer does not edit the order after you have submitted it, as their edits will not be part of the submitted order.

To submit an order:

1. Use the Order Review page to review the order summary information with the customer.
2. To make any changes, click Edit to go to the appropriate page. Then navigate back through the checkout process to the Order Review page.
3. If applicable, add any additional comments in the Add a Comment section.

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4. Click Submit to submit the order for processing.

You can also save the order without submitting it for fulfillment or create a scheduled order. For information on creating and submitting scheduled orders, refer to [Scheduling Orders \(page 30\)](#).

5. Once the order has been submitted, you will see the Confirm Order screen that contains the order confirmation number. You can send the order confirmation information to the customer by verifying their e-mail address and clicking Send. For anonymous users, you can create a profile from the information entered for the order.

Working with Promotions

When working with orders, you can assist the customer in the selection of promotions. Using the Promotions Browser, you can:

- Search for and review promotions by Type, Keyword and/or Date of Availability. If your site uses Multisite, you can also browse promotions by Site
- Grant a promotion or coupon and see its effect on the customer's current order
- Manually grant a non-global promotion
- Manually select promotions that should be applied to the current order

Promotions that the customer may qualify for are listed in their customer profile. However, when you are working with a customer's shopping cart, you will be able to apply other promotions to the current order by using the Promotions Browser. The Promotions Browser displays all available promotions in the Available Promotions tab and also allows you to search for promotions using the Promotion Search tab.

Note: The Promotions Browser does not appear when working on exchange orders or when modifying a submitted order.

Reviewing Available Promotions

You can use the Available Promotions tab to explore options with the promotions that are used to price the existing order. The tab shows all promotions that have been considered by the system when pricing the current order, as well as promotions that have been granted to the customer for future use. Promotions are grouped in the following way:

- Applied – Promotions whose conditions have been fully met and the discount has been applied to the order. Applied promotions are identified by a green icon
- Close – Promotions that have not yet qualified, but a closeness qualifier has identified them as being close to qualification. Close promotions are identified by a yellow icon
- Ignore – Promotions that you or another agent has marked to not include in the order's price. Ignored promotions are identified by a red icon
- Added – Promotions that you or another agent has explicitly granted to the customer using the Search Promotions tab. Added promotions are identified by a red icon but shows the granted icon
- Considered – Promotions have been applied to this order at some point during the order process but are not currently applied. Considered promotions are identified by a red icon

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- **Granted (active)** – Promotions that have been granted to the customer and are currently active. Granted promotions are identified by a red icon but display the granted icon
 - **Granted (future)** – Promotions that have been granted to the customer but are not currently active. Future promotions are identified by a grey icon
 - **Global** – Promotions that are global. Global promotions are identified by a red icon

The Promotions Browser displays the name of the promotion, including its start and end date. If the promotion has been applied to the current order, the Applied column will display the total that was applied. If you are using multiple sites, the site for which the promotion is available is also listed.

Ignoring a Promotion

From the Available Promotions tab, select the promotion to ignore and click the Ignore button. Once a promotion has been ignored, it will change to a red icon, indicating that the promotion has not been applied to the current order. You can re-apply the promotion by unselecting the Ignore box.

Searching for a Promotion

Use the Search Promotions tab to look for promotions that can be added to the current order. Promotions can be searched using:

- **Keywords** – Keywords are not case sensitive. To search on multiple keywords, use an AND condition between the keywords, for example: clocks AND watches
- **Promotion Type** – Promotions can be applied to orders, items, shipping or to all. You can use the Hide Promotions Available to All checkbox to omit global promotions in the search results
- **Promotion Date** – Using the Available menu, you can search for promotions that start today, start within the next seven days, end within the next seven days or all future or all expired promotions
- **Sites** – If you are working within a multisite environment, the list will contain all of the enable sites in the current cart sharing group

If your search returns any promotions, they are listed in the table.

Adding a Promotion

You can add a promotion to the current order by clicking the Add link of the promotion listed in the Promotions Results panel in the Search Promotions tab. The promotion will be added to the Available Promotions Browser tab. The order amount will be modified to include the new promotion.

Removing a Promotion

You can only remove promotions that have been granted by an agent. If there is a delete icon next to the promotion, click the delete icon to remove the promotion from the Available Promotions tab and to remove it from the current order. The order amount will be modified to remove the promotion.

Adding Gifts with Purchase Promotions

Commerce Service Center allows you to add a Gift with Purchase promotion, which is a promotion that occurs when a shopper qualifies for a free gift by making a specific purchase. This promotion recognizes a specific item

within the customer's shopping cart and indicates to you that a free gift is available. This promotion appears in the Promotions browser.

Free gifts, which are configured by your administrators, can be a single SKU or product, or an item from a single category or content group. If the free gift is being selected from a category or content group, a gift selector appears, allowing you to pick a gift from the available choices. The gift selector only presents a list of gifts that can be added to the current cart's sharing group. If the free gift is a single item, such as an SKU or product, the item is automatically added to the cart, if not in the cart already. If the item is already in the cart, the item's price changes to \$0.00.

Selecting a Free Gift

When you are working with an order and an item within the order qualifies for a free gift, one of two actions may occur:

- If the item qualifies for a single free gift, the item is added to the shopping cart. The price of the free gift will be set to \$0.00. If the free gift item has already been added to the order, the Total Price of the item will change to \$0.00
- If the item qualifies for a gift that must be selected, the Select Free Gift link appears

Should the gift that is selected not be available, you will be informed that the free gift selections are not available.

In the case where two gifts in the same line item come from different promotions, Commerce Service Center allows you to change the first gift in the item. To change the second gift, you need to remove the first gift from the item, and then change the second gift.

Ignoring or Removing a Free Gift

Should the shopper not want the gift, you can still submit the order without selecting a free gift. When you do, an informational message appears but the order is still submitted.

Free gifts can only be removed from orders that have not been submitted or fulfilled. To work with returning and/or exchanging orders with free gifts, refer to the [Issuing Refunds \(page 38\)](#) section.

You can remove a free gift from the order by selecting the delete icon next to the gift to remove the gift item from the shopping cart.

Scheduling Orders

Scheduled Orders allows you to configure recurring, automated orders during the checkout process. It is possible to create scheduled order for both registered customers, as well as anonymous users.

Scheduled orders are created using a *template* and a *schedule(s)*. A template is an object that you use to create the order, but a template is not submitted. After creating a template, you associate a schedule with the template. When the schedule is run, the template is copied to create an order, which is then submitted. You can associate multiple schedules with a single template.

When you create a schedule, you can submit the order, or you can create the schedule without submitting the order. If you create a schedule without submitting the order, the order will still be submitted at the time indicated by the schedule.

Scheduled orders are created based on one of two different types of schedules. The schedule can be periodic, which is based on a specific interval of days or weeks, or the schedule can be based on a calendar, which identifies specific days of the week or dates of the month.

A schedule also defines a period of time that the order will be fulfilled by defining a start and end date.

Creating a New Scheduled Order

Use the following steps to create a scheduled order.

1. Start the creation of a scheduled order by creating an initial order as described in the [Creating Orders \(page 22\)](#) section.
2. When you get to the Review Order Page, select the Create Schedule button, or the Submit and Create Schedule button. This opens the Scheduled Orders panel.
 - Clicking the Submit and Create Schedule button will submit the current order, and then will create a template that you can configure for scheduling
 - Clicking the Create Schedule button will use the new order as the template order and allow you to schedule the order for submission
3. Enter a descriptive name for the schedule. Multiple schedules can be saved with an order template so provide a name that best describes the schedule to avoid confusion.
4. Provide a start date for the schedule by entering a start date or using the calendar. The start date indicates the beginning of the period where the schedule will be valid. All orders start at 12:00 a.m. in the time zone of the Commerce server.
5. Create the schedule using intervals or calendar days.

When you create a schedule it runs after certain amounts of time. Schedules can be run on a daily basis, on selected days or specific dates.

- To schedule an order using intervals, select the Interval tab and enter a number in the Recurring Every field. Use the drop down menu to select days or weeks. For example entering 3 weeks would schedule the order to be run three weeks after the start date
- To select specific days, select the Calendar tab and click the Select Days button. Click the desired days of the week. When the day has been selected, there will be a green check mark next to the day. Once the day(s) have been selected, you can indicate if you want to schedule to run on a weekly basis or you can select the weeks of the month that the schedule should run

Note: You can select specific months in a similar manner by selecting the Select Months button and choosing the specific months for the schedule to run

- To indicate which occurrence within the month, select the Select Occurrence(s) link and click the weekly occurrence on which the schedule should run
- Use the Specific Dates button to choose specific dates of a month. For example, select 1 and 15 to have the scheduled order run on the first and the 15th of a month

-
6. If necessary, enter an end date. You can configure the schedule to end after a specific number of occurrences, or to end on a specific date. If there is no end date required for the schedule, select the No End Date button.
 7. Click the Schedule button to save the schedule. The Scheduled Order Confirmation page appears where you can send a confirmation of the scheduled order, obtain the scheduled order number and review the scheduling information.

Creating a Scheduled Order from a Previous Order

You can create a scheduled order from a customer's previous order.

1. Open the customer's profile. Select the order from the order history panel.
2. Copy the order. This will create a new order.
3. Follow the process for creating a new order as outlined in the [Creating Orders \(page 22\)](#) section.
4. At the Review Order page, create the schedule as outlined above in the [Creating a New Scheduled Order \(page 31\)](#).

Adding a Schedule to a Scheduled Order Template

Once you have created a scheduled order template, you can associate it with multiple schedules. The customer and order information remains the same for the order, but the frequency for which the order is scheduled can be modified. This is helpful in situations where the customer may wish to have an increased shipment during a particular season.

1. View the scheduled order template. You can search for scheduled order templates by selecting Scheduled Order Templates in the order status drop down menu of the Order Search screen or on the Profile View page.
2. Click Add Schedule. This allows you to create and add a new schedule to the template as outlined above in the [Creating a New Scheduled Order \(page 31\)](#) section.

Activating/Deactivating a Scheduled Order

Based on a scheduled orders status, the order can be activated or deactivated.

1. Select the scheduled order from the Customer's Order History panel.
2. Identify the scheduled order template to modify. Select Activate in the Actions column to activate a schedule that has been deactivated or has failed. Select Deactivate to deactivate an active schedule. A deactivated schedule will have the status of inactive or failed. Select Deactivate to deactivate a schedule that is active.
3. The status of the scheduled order will change in the Status column, and the scheduled order will be modified.

Fixing Failed Scheduled Orders

When a scheduled order fails, the order is not saved and the state of the schedule changes to Failed. The errors must be fixed in the scheduled order template and the schedule must be reactivated. If the schedule is reactivated without fixing the errors, the status of the schedule will change to active. If the next order submission fails again, the state will be changed back to Error.

Once the scheduled order template is fixed, the status of the schedule for the order will remain Failed until the order takes place and the next order submit has successfully occurred.

To view the errors that were encountered when the scheduled order was attempted, select the schedule's error link. Once the errors have been identified, return to the scheduled order view and follow these steps to correct any problems in the scheduled order template:

1. Open and edit the scheduled order to correct the problems. Use the associated edit links on the Scheduled Order View page to being making modifications.
2. Once you have fixed the errors, proceed through the check out process until you read the Order Review page.
3. Click Update to save the changes and navigate to the Scheduled Order Confirmation page.

The Order Confirmation page will indicate if there are any failed schedules associated with this scheduled order.

4. Use the Scheduled Order ID link to return to the Schedule Order page.
5. To reactivate the failed schedule but not submit an order, click Activate. This also recalculates the next occurrence of the schedule.
6. To reactivate and submit an order, click Activate to activate the schedule and then Submit Now to submit an order created from the template.

Searching For and Displaying Orders

You can search for an existing order in one of two ways:

- By order number, order status or order date. You can also search by customer login, customer first name, last name or e-mail address, or by a SKU ID. You can also restrict the search to find orders submitted between specific dates
- By advanced search criteria, which allows you to includes the customer shipping and /or billing information

When you search by order number or SKU ID, enter either the full number or a portion. When you search using advanced search criteria, enter the full address or billing information, or a portion. Search is not case-sensitive.

Use the arrow buttons on the Order Search Results page to move through the search results. You can sort the search results by clicking any of the column headings.

Note: You cannot search for incomplete orders, or orders that you have not yet submitted.

Searching for Orders by Order Number

To search for an order by order number:

1. Click the Search icon on the Orders button.
2. Enter the Order number and click Search.

The system returns a list of orders with order numbers that match the full or partial number you provided.

-
3. Select an order number.

The system displays the order's details on the Order View page. From this page, you can view and access the order's information.

Conducting Advanced Searches for Orders

An advanced search enables you to search for an order by order number, customer, shipping, and billing criteria.

To conduct an advanced search for an order:

1. Click Orders button.
2. Use the Search For Orders drop down menu. Select Advanced Search.
3. On the Advanced Search for Orders page, enter your search criteria in the fields provided.
4. Click Search. The system returns a list of orders that match the criteria you specified.
5. Click an order number.

The system displays the order's details on the Order View page. From this page, you can view and access the order's information.

Searching for Scheduled Orders

To search for a registered user's scheduled orders, select the user and open the Scheduled Orders panel to see all associated scheduled orders.

To search for anonymous scheduled orders, use Order Search to find the order number.

Note: Scheduled order templates do not have a Submitted Date because the template orders themselves are never submitted. As such, using the Search by Date field in Order Search cannot be used to find scheduled orders.

Search for scheduled order templates by selecting Scheduled Order Templates in the order status drop down menu of the Order Search screen. Order search can be used to find any scheduled order template, including those for registered users.

Modifying Existing Orders

You can access a customer's existing orders to make changes, such as adding items to an order, updating the quantities for items in an order, and even canceling an order.

For information on how to process refunds and exchanges, see [Handling Appeasements, Refunds, Exchanges, and Returns](#) (page 37).

The tasks that you can perform on an existing order depend on the order's stage of development, which is indicated by the order's status. For example, you cannot cancel an order with a status of No Pending Action

because an order with this status has already been shipped to the customer. Also note that individual items, shipping groups, and payment groups also have statuses to indicate their stage in the ordering process. Like order statuses, they also determine whether you can perform a given task. For each task described in this section, the statuses that prohibit the given task are noted.

Note: Commerce Service Center does not support Commerce B2B features within orders. If the order contains a B2B feature, such as a purchase order or cost centers, you will be able to view the order, but will be unable to make any modifications to the order. An error message will appear, indicating that the order contains unsupported features and cannot be modified.

For a list of all of the possible statuses, see [Appendix A, Commerce Status Codes \(page 45\)](#).

Adding Items to Existing Orders

You can add items to an existing order if the order does not have an order status of No Pending Action, Pending Remove, Removed or Pending Customer Return; and if no payment group has a status of Settled.

You can view the order's status on the Order View page, and you can view each payment group's status on the Billing page. For descriptions of all statuses, see [Appendix A, Commerce Status Codes \(page 45\)](#).

To add items to an existing order:

1. Display the order. Refer to [Searching For and Displaying Orders \(page 33\)](#).
2. In the Shopping Cart section, click Edit.
3. Add the item using the Product Catalog, or by entering the Product or SKU ID. Enter a quantity, and click Update.
4. Verify the Shipping and Billing information.
5. Submit the order.

Removing or Changing Items from Existing Orders

You can remove an item from an existing order if the item does not have an item status of Delivered, Pending Remove, Remove, Pending Return, or Returned; if the order does not have an order status of No Pending Action, Pending Remove, or Removed; and if no payment group has a status of Settled.

To remove an item from an existing order:

1. Display the order. Refer to [Searching For and Displaying Orders \(page 33\)](#).
2. In the Shopping Cart section, click Edit.
3. Remove the item by clicking the delete icon or changing the quantity and clicking Update.
4. Verify the Shipping and Billing information.
5. Submit the order.

Note: You do not need to change payment information when removing items from an order because the customer's credit card is not charged (nor store credits or gift certificates applied) until the order is being prepared for shipment by your company's fulfillment organization.

Adding Comments to an Order

To add comments to an existing order:

1. Display the order. Refer to [Searching For and Displaying Orders \(page 33\)](#).
2. Select Add New Note. Enter the note.
3. Click Save. The system saves your comments with the order.

Cancelling an Order

You can cancel an existing order if the order does not have an order status of No Pending Action, Pending Remove, and Removed; if no payment group has a status of Settled; if no shipping group has a status of No Pending Action; and if no item has a status of Delivered.

To cancel an order:

1. Display the order. Refer to [Searching For and Displaying Orders \(page 33\)](#).
2. Under the Shopping Cart section, click Edit, to edit the order.
3. Click Cancel in the global context are. The Cancel Confirmation window appears, asking if you want to cancel the order.
4. Click Yes to confirm cancellation.

Commerce Service Center sends a message to the Fulfillment system, which cancels the order and changes the order's status accordingly.

5 Handling Appeasements, Refunds, Exchanges, and Returns

If a customer is dissatisfied while creating an order, or if they are dissatisfied with merchandise they've purchased, an agent can issue an appeasement, a credit or assist the customer in exchanging and returning items. Additionally, an agent can make a manual adjustment to an order, such as adding additional shipping or reconciling prices, which may add to the total of the order.

Approving Adjusted Orders

When working with a customer's order, adjustments can be made to the order that either credits or debits the total order. The configuration of your environment determines if an approval is required for the order to continue through the work flow.

Appeasement Process

Your company may have set limits on the amount of the appeasement that an agent may issue. If so, before the order can be submit for fulfillment, the order must be approved. Once the order is submitted, the Order Confirmation page will indicate that the order requires approval. The order confirmation can be configured to send e-mail confirmation once the order has been approved or rejected. The state of the order will change to "Pending Agent Approval" if viewed in the Customer Order History or Order Search pages.

If the order is approved, the order status will change to "Approved" and will continue through the fulfillment process as usual.

If the order is rejected, the status of the order will change to "Agent Cancelled" and will be considered incomplete. Orders that are rejected cannot be edited or resubmitted. If there is an e-mail address associated with the address, an e-mail will be sent informing the customer that the order will not be fulfilled.

Assessing Orders

In order to approve or reject orders, you must have been provided with the correct authorization levels. Contact your administrator for additional information on approval authorization. If you have approval permission, you will have access to the Approvals page, which lists all of the orders that require approval.

The Approvals page is accessed through the Orders menu on the Commerce page. The menu item indicates that there are orders awaiting review by displaying a number next to the Approvals option.

Note: The number indicated on the menu may not be accurate, as the number is not updated continually.

Select the order to approve or reject. You can review the order by clicking on the order ID.

Approving Orders

Once you have reviewed the order and determined that the order will be approved, click the Approve link. The order will be sent forward through the submission process. If an e-mail address is available, an order approval confirmation will be sent to the customer as usual.

Rejecting Orders

If you review the order and determine that the order should be rejected, click the Reject link. The order will be set to the order status "Agent Cancelled". Orders that have been rejected cannot be modified or resubmitted. If an e-mail address is available, an order rejection e-mail will be sent to the customer indicating that the order will not be fulfilled.

Issuing Refunds

When you issue a refund to a customer, you can credit the credit card used to pay for the order, give a store credit to the customer, or do both. The refund can include the item costs, shipping charges, and taxes associated with the order. Note that Commerce Service Center limits the maximum refund amount that can be credited to the customer's credit card to the amount that was originally charged to the card.

You can issue a refund for items only if all shipping group items have been marked as fulfilled. For example, if there is one item in a shipping group of ten items that has not yet been marked fulfilled, a refund cannot be performed against any of the nine fulfilled items. (See [Shipping Group Statuses \(page 46\)](#) for a list of the shipping group statuses used by Commerce Service Center.)

To issue a refund:

1. Display the order.
2. Select Process Returns and Exchanges.

The system displays the Create Exchanges and Returns page, which lists by shipping group all of the items the customer can return for a refund.

3. Locate the item that the customer wants to return.
4. In the corresponding Quantity to Return text box, type the quantity of the item the customer is returning.
5. From the Reason for Returning Item drop-down list, select the reason the customer is returning the item. Click Return Only to make changes.

Note: In some situations, the customer may not need or be able to return the item for which a refund is requested. For example, the customer may have ordered a plant that arrived damaged.

6. Enter the refund amounts, if necessary. This includes, if applicable, the cost of shipping, taxes or other fees, such as a return fee.

Note: Refund amounts cannot be debits, they must be credits. If a refund debit is issued, an error message will occur.

-
7. Click Update Amounts.

The system displays the return items and their associated costs.

8. Indicate the type of Refund Type by applying the total refund or portion of the refund in either the store credit or a credit card field.
9. To split the refund between Refund Types (for example, store credit and credit card refund) use the Apply Remainder icon.

For example, to split a \$300.00 refund between a store credit and a credit card refund, enter \$100.00 in the Store Credit refund field, and click Split Remainder next to the Credit Card refund field. The remainder of the refund, \$200.00, will be put into the Credit Card refund field. Click Next.

10. Verify the return and refund information on the screen. Click the Edit icon to make changes.

11. Optionally, add any notes to the refund.

12. Click Submit Return to initiate the return.

A return order confirmation number appears. The system can send this number in an e-mail to the customer if you provide an e-mail address and click Send.

Returns with Manual Adjustments

If you are working on a return that contains an item that had a manual adjustment, you must adjust the cost of the return item to reflect the cost adjustment. However, you cannot make a new manual adjustment to a return order.

Returns with In-Store Pickup

When a customer wants to return part of an order that contained an item that they picked up in a local store, you will only be able to issue a store credit as a refund.

Issuing Exchanges

To process an exchange, you perform the following steps:

1. Indicate the item(s) to be returned from the customer's order.
2. Select new items for the exchange from the Product Catalog.

Note: If you are using multiple sites, ensure that you are using the Product Catalog that is associated with correct site. If you change the associated site or shopping cart sharing group, you will lose the exchange order.

3. Review the Shopping Cart to verify the information is correct.
4. Indicate new or verify existing shipping information.
5. Select refund or payment type(s).
6. Complete the return and provide the customer with the return IDs.

When you issue an exchange, Commerce Service Center creates a refund for the returned items and a new order for the replacement items, and applies the refund to the replacement order. You cannot add new promotions or make adjustments (such as changing the type of currency) to the order when issuing an exchange.

You can issue an exchange for items only if all shipping group items have been marked as fulfilled. For example, if there is one item in a shipping group of ten items that has not been marked fulfilled, an exchange cannot be performed against any of the nine fulfilled items. (See [Shipping Group Statuses \(page 46\)](#) for a list of the shipping group statuses used by Commerce Service Center.)

Note: When issuing an exchange, if you select a replacement item that is not available, Commerce Service Center will begin to issue a refund for the item instead. You are warned of this situation so you can select an alternate replacement item, if desired.

Also note that the pricing of replacement orders is based on the replacement item's current price, and not the price that the replacement item was when the original order was placed.

To issue an exchange:

1. Display the order.
2. Select Process Returns and Exchanges.

The system displays the Create Exchanges and Returns page, which lists by shipping group all of the items the customer can return for a refund.

3. Locate the item that the customer wants to exchange.
4. In the corresponding Quantity to Return text box, type the quantity of the item the customer is exchanging.
5. From the Reason for Returning Item drop-down list, select the reason the customer is exchanging the item. Click Return & Exchange to make to start the exchange.
6. The system displays the Exchange Items page, which lists the items the customer wishes to exchange and access to the Product Catalog.
7. Locate a replacement item for the customer by using the Product Catalog.
 - If the customer wants an identical replacement item, enter the SKU information in the Search by Product ID panel. Add the item to the shopping cart and click Update to enter the item information
 - If the customer wants a different replacement item, search for a product based on the exchanged item, such as item price or description. Add the item to the shopping cart and click Add to Cart
8. In the Shopping Cart, enter any additional refund amounts that should be applied to the exchange.
9. Click Check Out to continue the exchange.
10. The system continues through the usual order creation process and displays the Shipping Information page for the replacement order. Verify or modify the shipping information for the replacement order and then click the Next button.
11. On the Shipping Method page, enter the shipping method the customer wishes to use, and click the Next button.
12. On the Billing Information page, enter the payment information for the replacement order and then click the Next button.

The Payment Method section indicates that the store credit will be applied to the replacement order. However, if a refund is due, that amount must be allocated back to a credit card or as a store credit

appropriately. For example, if an order originally cost \$100 and the shopper used a \$20 store credit plus charged \$60 to a credit card, \$100 should not be credited to their credit card. Instead, \$20 or more should be given as a store credit, and the remaining refunded to one or more credit cards.

13. Verify the exchange information.

14. Add any comments in the text box in the Add Comments section.

15. Click the Submit Exchange button to submit the replacement order.

The system submits the exchange request and displays the Replacement Order Number for the new order and the Return Authorization Number for the return on the Exchanges Submitted page. You can provide both of these numbers to the customer by entering the customer's e-mail address and clicking Send.

Note: If the customer is returning an item, they should mark the returned items with the Return Authorization Number; this ensures they are associated with the correct customer and order upon receipt by your company.

Cancelling an Exchange

You can cancel an exchange at any point by clicking the global context area Cancel icon while entering the exchange information.

1. When you click the Cancel icon, you will be prompted to make a choice:
 - You can cancel the new order portion of the exchange. Select this option when you want to cancel the exchange process because the customer has decided that they would rather have a refund
 - You can cancel both the return and the new order. Select this option to cancel the entire exchange and return process because, for example, the customer has decided to keep the merchandise
2. After you have indicated the action to take, click Yes to cancel the order. Click No to end the cancelling process and return to the Exchange screen.

Pricing Irregularities with Returns and Exchanges

Products from an original order maintain the pricing from that original order, so when the product is displayed in an exchange order, the product maintains its original pricing. However, in the following situations, pricing results may be different than expected:

Example One

In a situation where an order contains two different items, and the first item is returned and another of the second item is purchased, the original sales price of the second item is maintained:

1. A customer buys item X as well as item Y, which is on sale for 50% off.
2. After the sale on item Y has concluded, the customer returns item X and buys item Z as well as an additional item Y. Item Z is priced using the current pricing. But because item Y was in the original order, it maintains the original order pricing of 50% off.

Example Two

If an item in an original order was priced with a price override, the price for any items that are added to the Exchange Order will not be calculated. For example:

1. The original order contains a quantity of three of item X with a list price of \$10.00 each. The total price for the three items has been overridden to \$21.00, or \$7.00 each.
2. The customer returns one of item X, and adds one of item X to the Exchange Order.

Commerce Service Center calculates a return amount for item X by taking the total price and dividing by the number of items (3/\$21.00) or \$7.00. Any remainder will stay in the original order until the last item is returned. However, Commerce Service Center does not use the original price for item X in the Exchange Order, but calculates new pricing, or \$10.00. **Note:** Agents can override the Exchange Order price if necessary.

Example Three

Tax calculations are affected by the total amount purchased. If the return contains fewer items than the original order, the tax amount may differ from the total of the tax shares of the items in the original order. For example:

1. The customer purchases three items at \$1.09 each with a tax rate of 5%. The original tax amount will be \$17.00.
2. If the customer exchanges each item in three separate exchanges, the tax amount will be calculated as \$.06 for each exchanged item. This calculation may or may not total the original tax return credit. For example, the total of the exchanges comes to \$.18, even though the refund tax credit is only \$.17. This is analogous to the difference in tax calculations when, instead of buying all three items at once, the customer buys three items individually.

Returned or Exchanged Items and Free Gifts

When you are working with a return order and there is a Gift with Purchase promotion applied to the returned item, note that unless your administrators have configured Commerce Service Center differently, Commerce Service Center will not remove the gift that is associated with the returned item from the cart, but will re-price the gift within the order. Depending on your company policy, you can manually re-price the returned item or the gift as necessary.

When you are working on an exchange order and there is a Gift with Purchase promotion applied to the exchanged item, you may experience differences depending on the type of gift. If there are multiple selections for a free gift, when you add the exchange item to the order, no free gift selectors will appear. However, if the free gift was a single SKU or product, there may be a Select Free Gift link in the exchange cart.

Processing Returned Items

Once a user returns an item that has been created through the refund or exchange process, you must indicate that the item has been received.

To process a return:

1. Open the order, ensuring that it is the active order.

The system displays the Order View page. The order page indicates that a return has been approved.

2. Scroll to the Returns History to review the returns that are associated with this order.
3. Use the Receive Returns panel to open the return number.
4. Select the action to take with the Item Disposition drop-down list and enter a quantity to receive.
5. Check the box next to the return number and click Receive Return.

The system processes the item as returned and returns you to the Order View page with the order indicating that the return has been received by labeling it as Returned.

Appendix A. Commerce Status Codes

This appendix provides information about the status codes used in Commerce.

Order Statuses

The status of an order indicates where the order is in the order process. You can view the order's status in the Commerce Service Center on the Order Details page. The following table describes each order status.

Order Status	Description
Approved	The order has been approved by either an approver of the organization or an agent.
Failed	Not used. However, by default you can search by this status on the <i>Advanced Search for Orders</i> page.
Failed Approval	The order has been rejected by either an approver of the organization or an agent.
Incomplete	The order is unfinished and has not been checked out by the customer yet.
No Pending Action	The order has shipped. It is en route to the customer via your company's transport carrier.
Pending Customer Action	Not used. However, by default you can search by this status on the <i>Advanced Search for Orders</i> page.
Pending Customer Return	The order is awaiting the receipt of a returned item (or items), sent back from the customer to your company.
Pending Merchant Action	The order is awaiting action by an agent due to a system error when processing the order, such as a system failure in accessing inventory data.
Pending Approval	The order requires the approval of an approver of the organization or the agent before it can complete the checkout process.
Pending Remove	The order is in the process of being canceled.

Order Status	Description
Processing	The order is being packed and prepared for shipment to the customer.
Quoted	Not used. However, by default you can search by this status on the Advanced Search for Orders panel.
Removed	The order has been canceled. It will not be shipped to the customer.
Submitted	The order has been submitted to the warehouse staff to begin fulfillment.
Template	The order is not an actual order that will be checked out. Instead, it is an order template that is used for a scheduled order service. Orders that will be checked out are created from this template on a defined schedule.

Shipping Group Statuses

The status of a shipping group indicates where the individual shipping group is in the shipping process. You can view the status of each shipping group for an order on the Order Shipping page. Note that for orders with multiple shipping addresses, each shipping address has its own status. The following table describes each shipping group status.

Shipping Status	Description
Initial	The beginning state of a shipping group.
No Pending Action	The items in the shipping group have shipped. They are en route to the designated shipping address.
Pending Merchant Action	An agent must complete some task before the items in the shipping group can ship, such as resolving a failed credit card transaction.
Pending Shipment	The items in the shipping group are packaged and ready to ship.
Processing	The items in the shipping group are being prepared for shipment.

Payment Group Statuses

The status of a payment group indicates where the payment group, typically a credit card, is in the payment process. You can view the status of each payment group for an order on the Order Payment page. The following table describes each payment group status.

Payment Status	Description
Authorized	Authorization for a charge to the credit card has succeeded.
Authorize Failed	Authorization for a charge to the credit card has failed.
Credit Failed	A credit of a specific amount has failed to be applied to the credit card.
Initial	The beginning state of a credit card.
Settle Failed	A charge of a specific amount has failed to be applied to the credit card.
Settled	A charge of a specific amount has been applied successfully to the credit card.

Item Statuses

The status of an item indicates where an individual item is in the shipping process. The following table describes each item status.

Item Status	Description
Backordered	The item currently is not available in your company's inventory; it has been reordered.
Delivered	The item has been shipped to the customer.
Discontinued	The item is not available in your company's inventory because the company no longer carries the item.
Item Not Found	The item is not available in your company's inventory because the company does not carry it.
Initial	The beginning state of an item.
Out of Stock	The item currently is not available in your company's inventory; it has not been reordered.
Pending Delivery	The item is ready for shipment to the customer.
Pending Return	The agent has submitted a return request for the item, but the item has not been received by your company yet.
Pending Sub-Item Delivery	The item is available in your company's inventory. It is being prepared for shipment to the customer.
Preordered	The item currently is not available in your company's inventory. The company did not previously carry the item, and the initial shipment of stock has not arrived.

Item Status	Description
Pending Remove	The agent has requested that the item be deleted from the order. Commerce is determining whether the item can be removed (for example, the item has not already shipped).
Removed	The item has been removed from the order.
Returned	The item has been returned by the customer, and the return has been processed.

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