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# **ATG WEB COMMERCE**

Service Center

Version 10.0.2

User Guide

**Oracle ATG  
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## **ATG Commerce Service Center User Guide**

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# 1 Introduction

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

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

For information about ATG 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, email 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/ATG10.0.2.
- 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:

Document	Description
<a href="#">ATG Ticketing Guide for Business Users</a>	Describes ATG Ticketing, including how to create, manage and work on tickets. Intended for customer service representatives, service managers and site administrators.
<a href="#">ATG Content Administration Guide for Business Users</a>	Describes how to use the ATG Business Control Center to create and manage Web site assets for ATG Content Administration. Intended for content developers and editors.
<a href="#">ATG Knowledge Guide for Business Users</a>	Designed to help business users understand and work with ATG Knowledge using the ATG Workspace user interface. Describes how to perform typical tasks such as searching for content to help customers, creating complex search queries, authoring content, sending content via e-mail, and viewing reports.

The following ATG manuals provide additional reference information:

Document	Description
<a href="#">ATG Commerce Guide to Setting Up a Store</a>	Describes how to configure and setup ATG Commerce in a retail environment. Intended for business users and page developers.
<a href="#">ATG Personalization Guide for Business Users</a>	Designed to help business users understand and work with the ATG Personalization and Scenarios modules. Describes how to use the ATG Control Center 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 CSC, contact your Site Administrator to verify that you have the following access rights:

- Access rights to CSC
- Access to each of the CSC databases

## Browser and Environment Requirements

For information about the supported browsers, environments, and configurations, see <http://www.atg.com/en/products-services/commerce/supported-environments/>.





## 2 Using ATG Commerce Service Center

ATG Commerce Service Center (CSC) 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 CSC.

### Accessing ATG Commerce Service Center

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

Access CSC with the following URL:

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

The *hostname* is the name of the machine on which CSC 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 CSC 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 CSC:

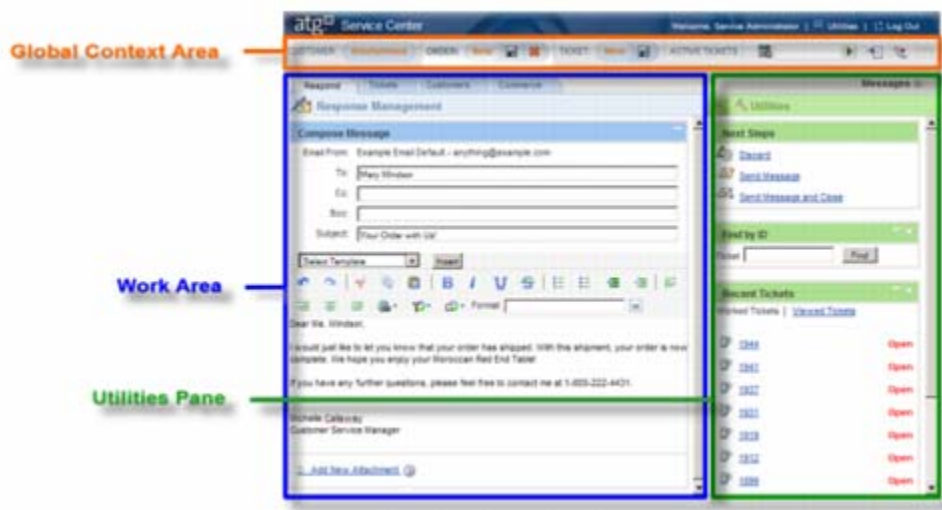
1. Open the URL for the ATG Commerce Service Center Login page.
2. Enter your login in the Username field. Note that the Username field is case sensitive.
3. Enter your password in the Password field. Note that the Password field is case sensitive.
4. Click the Login button.



## Using ATG Commerce Service Center

The CSC 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 tabs that group similar tasks.
- Utilities Window – This window contains various tools that become available based on the task you are performing.



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

Tab	Description
Customer	Use this tab 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.
Commerce	The Commerce tab 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 <a href="#">ATG Ticketing Guide for Business Users</a>
Respond	The Respond tab allows you to communicate with others through email.



## Navigating ATG Commerce Service Center

There are several ways to navigate through CSC.

### *Using the Keyboard*

CSC 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, tabs, 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 CSC, 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 using the appropriate icon.

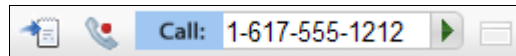


When you have completed the call, you can end the call by clicking on either the End Call button, or the End Call and Start New Call button. The End Call button stops the timer and records the length of the call.



### Calling with ATG Click to Call

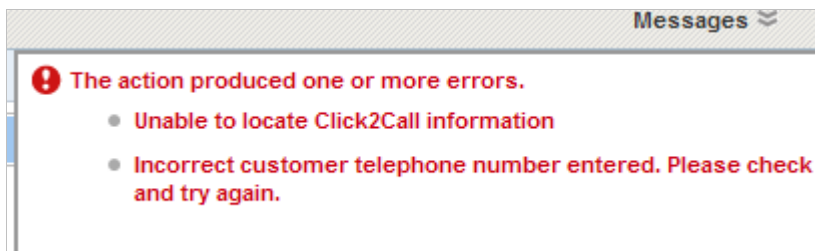
If you have the optional ATG Click to Call software, customer calls may be routed to you automatically. Depending on the configuration of your system, the phone number of the customer may be entered automatically into the call field. If not, enter the number of the customer and click the call button.



Once you have entered the customer's phone number, CSC will clear all global context items, such as the current ticket or current customer. Then CSC will populate the global context bar 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 an ATG Click to Call 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, such as the following. Re-enter the number to correct the error:



### Logging Out

Before logging out of CSC 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, CSC 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. CSC 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.

CSC 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 CSC interface.



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 CSC.

### 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 CSC 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. However, it is important to note that there may be multiple sites available when you are working with catalogs, price lists and sales price lists. For additional information on sites and site configuration, refer to the [ATG Multisite Administration Guide](#).

When you log into CSC, 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.



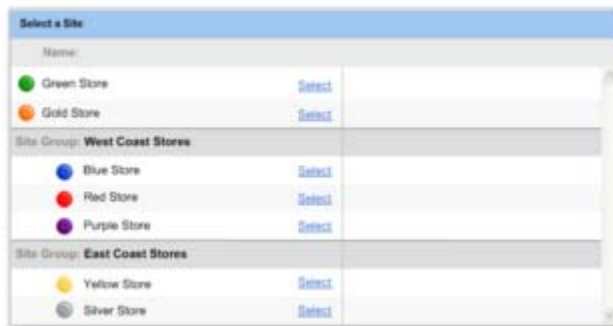
**Using the Site Picker**

The site picker displays different information depending on the configuration of your environment. The header on the Commerce tab 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

CSC 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.

You can work with customers using the Customers tab. Additionally, you can use the Customers sub-menu on the Commerce tab to work with customers.

#### Searching For Customers

To search for a customer:

1. Select the Customers tab.
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](#).
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 email 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 email 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](#)
2. Click the customer's name in the global context area. This brings up the customer's profile page.
3. Click the Add New Address 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, CSC 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](#).
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](#).
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 CSC.

### ***Adding a Credit Card***

1. Activate the customer as outlined in [Searching for Customers](#).
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](#).
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](#).
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 CSC 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, CSC 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](#).
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](#).
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](#).

## **Working with Customer Gift and Wish Lists**

ATG Commerce allows registered customers to create gift lists and a wish list. If necessary, you can use CSC 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 tab 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 Commerce tab, select the Products menu.
2. Select the Search for Gift List menu item. The Search Gift List panel appears.
3. Enter at least one field to search for a gift list.
4. Click Search to see the results.
5. When you select one of the gift lists, the gift list is displayed in the View Gift List panel.
6. 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 tab. Gift lists can be created, edited, and deleted.

1. Open the customer profile of the active customer in the Customer tab. 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.



**Create Gift List**

Create Gift List

Owner: Anna Parker

\* Event Name: Anna's Birthday

\* Event Type: - Select a Type -

\* Event Date: 06/18/2010

Site: Main Store US Site

Status:  Private  Public

Shipping Address:  No address  Use existing address 49 Spring St  Add new address

OK Cancel

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 the ATG Multisite feature, 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 CSC, 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 the ATG Multisite feature, 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 tab.

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.

Gift/Wish Lists				
View: <span>Wish List</span>				
Item Description	Status	Price		
<a href="#">Braided Leather Belt</a> xsku1029	In Stock	\$45.00	<input type="button" value="Add to Cart"/>	
<a href="#">Straight Leg Khakis</a> xsku1319	In Stock	<del>\$58.00</del> \$42.00	<input type="button" value="Add to Cart"/>	

### Adding Wish List Items to the Order

1. Open the customer profile of the active customer in the Customer tab. 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 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.

To create a new customer profile:

1. Click the Customers tab.
2. Click the Create New Customer link.  
The system displays the Customer Information page.
3. 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.
4. Click Save. The system responds that the information for the customer has been updated.
5. 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.

You can also create a new customer by accessing the Customers sub-menu on the Commerce tab.





## 4 Working with Orders

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

### Searching for Products

CSC 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 Commerce tab displays the Product sub menu.
2. Click the Product submenu link to search the product catalog. You can also browse the product catalog.  
  
You may search for items by site or by using all or part of the 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](#) for instructions on creating an entire new order.

### Creating Orders

**ATG Click to Call Users Note:** If you are working with an order from a customer that contacted you through the optional ATG Click to Call integration, meaning that you entered, or were routed to, an ATG



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 an ATG Click to Call customer, they will encounter synchronization errors if they are still on a check out page.

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](#).

Creating an order involves the following steps:

1. From the Commerce tab, select Orders on the navigation bar.
2. From the Orders menu, select the Create New Order link.
3. Add items to the order. Refer to [Adding Items to an Order](#).
4. Review your selections in the Shopping Cart.
5. Specify the shipping information for the order. Refer to [Selecting a Shipping Address for a New Order](#).
6. Specify the shipping method for the order. Refer to [Entering Shipping Methods](#).
7. Specify the payment information for the order. Refer to [Adding Billing Information](#).
8. Submit the order. Refer to [Submitting an Order](#).

When you create an order, CSC 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 CSC, 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

CSC 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 don't know the SKU number for the item, you can conduct a search for the item. CSC provides a search feature



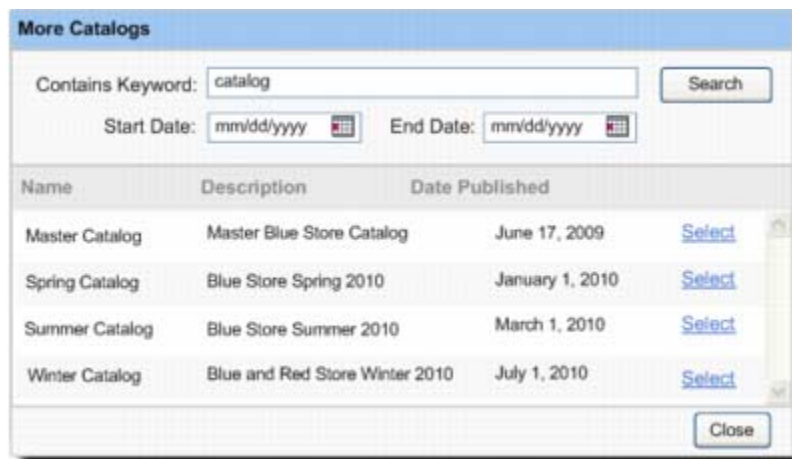
that allows you to search for the item by site, SKU number, price, category, description, or a combination of these. Note, however, if your site uses price lists, you can select a single price list to be used in the current order for a list of all price lists. If you are working with a site that belongs 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 tab. Enter the customer information as outlined in [Working with Customers](#). 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 Commerce tab and select Products. The Product Catalog screen appears.
3. Click Add Products by ID
4. Enter the Product or SKU ID for the item.



5. If you entered a Product ID number, a popup 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 don't know the SKU number for the item, you can search for the item, as described in [Searching For and Displaying Orders](#).

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.

### ***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 in 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, CSC 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](#).

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 Shipping to This Address link located above the desired address. This navigates you to the shipping method page.
  - 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 New Shipping Address link and enter the address 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 Billing Information](#).

### *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 Ship to Multiple Addresses.
3. For each item in the order, select a shipping address from the Shipping Address drop-down list. The Shipping Address 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.

**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 Select Shipping Method to select the shipping method for each shipment. Refer to [Entering Shipping Methods](#).

## Entering Shipping Methods

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

1. For each shipment address, select a shipping method.
2. Verify that the address and order information are correct.
3. Click Continue to Billing to add the payment information to the order. See [Adding Billing Information](#).

## Adding Billing 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.

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 Payment Method section, select a payment method, such as credit card, gift certificate, or store credit.
 

**Note:** To enter a new credit card, click Add New Credit Card, enter the credit card information, and then click Add to save the card. Select the checkbox to add this credit card information to the user profile.
  - 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.
3. Click Continue to Order Review.

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

## Submitting an Order

**Note:** If you are submitting an order from a customer that contacted you with the optional ATG Click to Call integration, meaning that you entered, or were routed to, a phone number from an ATG ClicktoCall 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.
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](#).
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 the ATG Multisite feature, you can also browse promotions by Site.
- Grant a promotion 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 by are not currently applied. Considered promotions are identified by a red icon
- 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

**Promotions Browser**

Available Promotions Promotions Search

27 available promotions

Name	Site(s)	Start Date	End Date	Ignore	Applied
Free Ground Shipping on orders over \$100	Any	Jan 14, 2010	Jan 16, 2011	<input type="checkbox"/>	(\$4.99)
10% off order over \$300	Any	Jan 11, 2010	Feb 23, 2011	<input checked="" type="checkbox"/>	(\$33.00)
\$10 off any order for loyal customers	Any	Jul 10, 2010	Sep 16, 2011	<input checked="" type="checkbox"/>	(\$10.00)
\$25 off any 4 pairs of shoes	Any	Jun 12, 2010	Aug 23, 2010	<input type="checkbox"/>	
Buy 3 pairs of Jordans, get 50% off ...	Basketball...	Jun 14, 2010	Nov 16, 2010	<input checked="" type="checkbox"/>	
Buy 3 pairs of shoes, get \$20 off	Any	Mar 12, 2010	Sept 11, 2010	<input checked="" type="checkbox"/>	*
Free water bottle with order over \$200	Any	Jun 11, 2010	Jul 23, 2011	<input checked="" type="checkbox"/>	*
20% off order over \$500	Any	Jan 11, 2010	Sept 23, 2010	<input type="checkbox"/>	
Buy one t-shirt get second at 50% off	Soccer	Jun 14, 2010	Jul 16, 2011	<input type="checkbox"/>	
Get \$10 off future order when you buy ...	Any	Mar 12, 2010	Aug 23, 2010	<input type="checkbox"/>	

\* promotion can be applied to current order

Update

**Order Summary**

Subtotal: 330.00  
 Tax: (47.99)  
 Order Discount: 0.00  
 Adjustment: 0.00  
 Shipping: 4.99  
**Amount Due: 287.00**

OK Cancel

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 search 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 Hid 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 tab.

### ***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.

## **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](#) 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 15<sup>th</sup> 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](#) section.
4. At the Review Order page, create the schedule as outlined above in the [Creating a New Scheduled Order](#).

## 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](#) 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 begin 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 email 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 include 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 Orders on the main navigation bar.
2. Select Search For Orders.
3. 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.

4. 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 on the main navigation bar.
2. Select Search For Orders. 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](#).

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 can't 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.

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

### 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: ATG Commerce Status Codes](#).

To add items to an existing order:

1. Display the order. Refer to [Searching For and Displaying Orders](#).
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 doesn't 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](#).
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](#).
2. Select Add New Note. Enter the note.
3. Click Save. The system saves your comments with the order.

## Canceling 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](#).
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.

CSC 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 email 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.

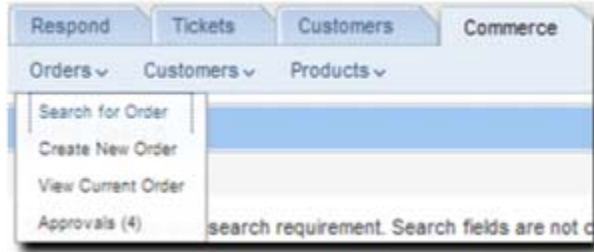
If the order is rejected, the status of the order will change to "Agent Cancelled" and will be considered incomplete. Orders that are rejected cannot be edited or resubmitted. If there is an email address associated with the address, an email will be sent informing the customer that the order will not 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 tab. 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 email 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 email address is available, an order rejection email 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 CSC 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 can not be performed against any of the nine fulfilled items. (See [Shipping Group Statuses](#) for a list of the shipping group statuses used by CSC.)

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.

	Qty Ordered (Returned)	Qty to Return	SKU	Name	Reason
	1 (0)	1	xsku2502_8	Hoodie inspired sun dress - Size: 4 - Color: Green	Incorrect Size
	1 (0)	0	xsku2125	Butchers Block Table	-Select a Reason-

Return Only    Return & Exchange

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.

**Return Details**

Return Items

Hoodie inspired sun dress - Size: 4 - Color: Green xsku2502_8 Suggested Shipping: (\$1.18)	(\$79.00)
--	-----------

Subtotal	(\$79.00)
Tax	(\$3.95)
Shipping Adjustment	(\$1.18)
Other Adjustment	(\$0.00)
Less Return Fee	\$0.00
<b>Return Credit:</b>	<b>(\$84.13)</b>

Update Amounts    Reset Defaults

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.

Type	Exp. Date		Amount	Amount Originally Charged
Store Credit ( No Limit )	N/A	✓	<input type="text" value="200.00"/>	N/A
Visa - 1111	5/2008	✓	<input type="text" value="100.00"/>	\$3,550.00

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 email to the customer if you provide an email 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.

## 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, CSC 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 can not be performed against any of the nine fulfilled items. (See [Shipping Group Statuses](#) for a list of the shipping group statuses used by CSC.)

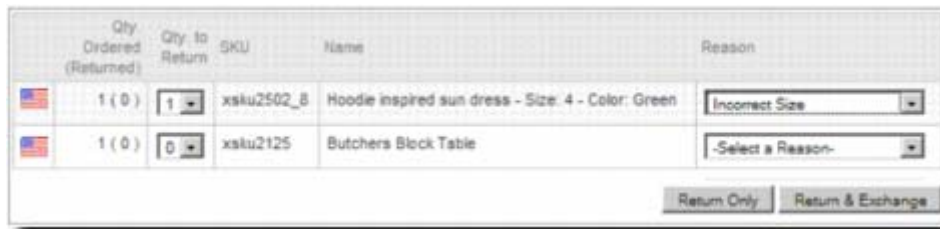
**Note:** When issuing an exchange, if you select a replacement item that is not available, CSC will begin to issue a refund for the item instead. You are warned of this situation so you can select an alternate replacement item, if desired.

To issue an exchange:

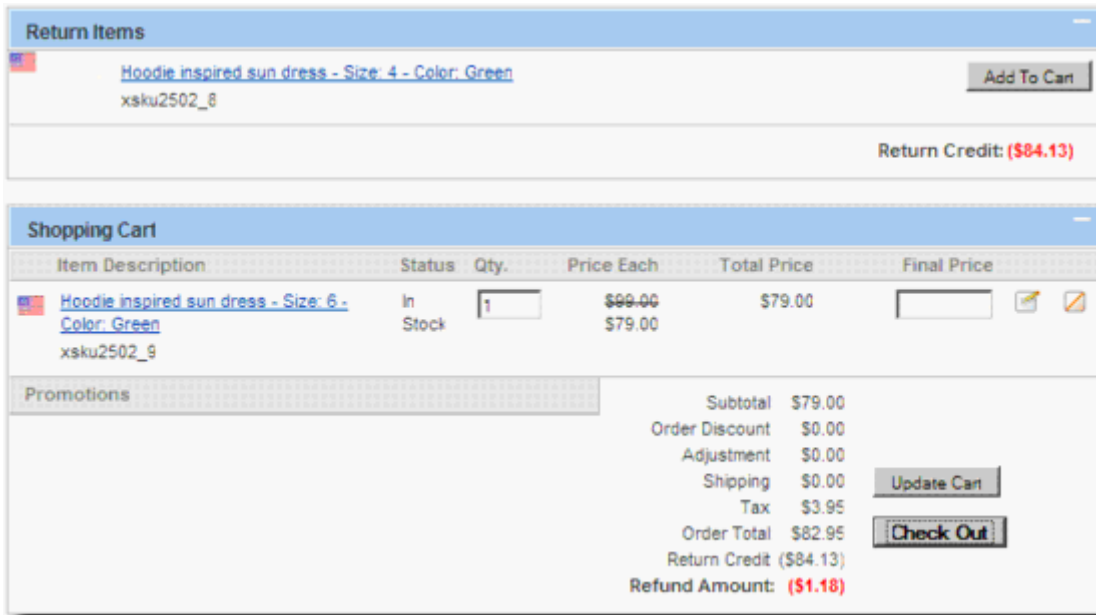
1. Display the order.
2. Select Process Returns and Exchanges.

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 email 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.



Whenever you create an exchange, items within the exchange will be priced at the current price of the object. This may not match the original price of the exchange. Additionally, items within the exchange order can be applied towards promotions.

However, returns on an exchange order will use the original pricing of the return item from the order they were purchased in. The return item will also use only the currently qualified promotions from the original order.

## Working with Promotions and Exchanges

When you are working with an exchange that contains promotions, with the exception of new shipping promotions, you will not be able to create new promotions for the exchange order. If there are additional items that must be added to the order, you must create a new order.

**Notes:** Once a promotion has been used, it cannot be reapplied to the exchange.

## Cancelling an Exchange

You can cancel an exchange at any point by clicking the global content 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 item is returned and another item is purchased, the original sales price 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 Y has concluded, the customer returns item X and buys an additional item Y.



3. In this exchange, the Exchange Order will price item Y at the original 50% off sales price.

### 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 for \$19.95 each.
2. The customer returns one of item X, which adds two of item X to the Exchange Order.

CSC calculates a return amount for item X by taking the total price and dividing by the number of items. Any remainder will stay in the original order until the last item is returned. However, CSC does not use the original price for item X in the Exchange Order, but calculates new pricing. **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.
2. If the customer returns an item, the tax amount will be \$.06.
3. If the customer returns the other two items, they will be refunded the remaining \$.11 tax amount.

## 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 pen the return number.





<input type="checkbox"/>	Return	Date Submitted	Type	# of Items	Total Amount	Status
<input type="checkbox"/>	ret10007	06/19/2007	Return	1	\$1,468.97	Approved

<input type="checkbox"/>	SKU	Description	Qty. Returned (Received)	Amount	Status	Item Disposition	Qty. to Receive
<input type="checkbox"/>	sku50003	UltraLight Pro Ti Large	1 (0)	(\$1,468.97)	Approved	-Select a Reason-	0

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.

Shopping Cart				
Item Description	Status	Qty.	Price Each	Total Price
UltraLight Pro Ti Large sku50003	In Stock	2	\$1,800.00	\$3,600.00
BatGoose Super Cranks 2W sku170017	In Stock	2	\$375.00	\$750.00
UltraLight Pro Ti Large sku50003	Returned	-1		





## 6 Working with Tickets

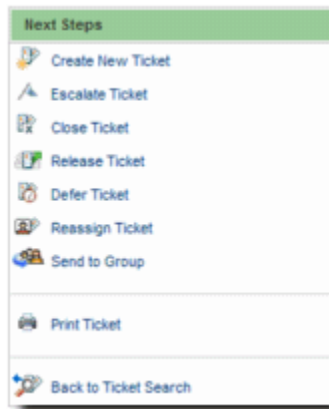
A new, temporary ticket is created whenever you start a new call. As you perform various activities (create a profile, create and submit an order, process returns, etc.), these activities are recorded in the ticket. Later, you can consult the ticket for information, or update the ticket to add further information or activities.

When you modify or submit an order, the current ticket is associated with the order. If you create a new ticket and then modify an existing order, the new ticket will be associated with the existing order. Multiple tickets can be associated with a single order, and multiple orders can be associated with a single ticket.

For additional information on working with tickets, refer to the [ATG Ticketing Guide for Business Users](#).

### Working with Current Tickets

When you select the Ticket tab, the Next Steps panel provides direction regarding the available options for working with the ticket.



#### Viewing Details About the Current Ticket

To view detailed information about the current ticket:

1. In the Global Context Area, select the link for the active ticket.



2. Service Center opens and displays the ticket information.

## Searching for a Ticket

To search for a ticket:

1. Select the Tickets tab.
2. Enter the Ticket number in the Quick Search box.  
Service Center returns the tickets in the Ticket Results panel. Select the ticket to make it active in the Global Context Area.
3. You can also use the Advanced Search link to search for tickets based on criteria you enter, including Ticket Status, Ticket Escalation Level or Ticket Assignee.
4. Click Find. The results are returned in the Ticket Search Results panel.

## Working with a Ticket

When you work on a ticket, you take ownership of the ticket.

1. Search for a ticket.
2. Select the ticket using the Work on a Ticket link from the Ticket Search panel.
3. Ensure that the ticket is the Current Ticket, displayed in the Global Context Area as the Current Ticket.
4. When you work with the current ticket, you can perform the following tasks:
  - Reassign the current ticket to someone else by entering another user
  - Defer the current ticket until a later date by entering a date
  - Release the current ticket so that someone else can work on the ticket

## Editing a Ticket

To edit a ticket:

1. In the Global Context Area, click on the link for the current ticket.  
CSC displays the ticket information.
2. Click the Edit icon.
3. Modify the ticket, and click Save.

## Escalating a Ticket

You can escalate a ticket to a manager or a group. Your organization defines specific escalation levels that are used when a ticket is created. If you need a manager to review the ticket, you escalate the ticket. Escalating a ticket does not modify the ticket status. It marks the ticket as escalated and sends information to the audience your organization has set up for escalations.

1. Ensure that the ticket is active.



2. Click the Escalate Ticket link.
3. Enter the information, including the escalation level and the Reason Code. Include a note if applicable.
4. Click OK to escalate the ticket.

The screenshot shows a dialog box titled "Escalate Ticket". It contains the following elements:

- Group:** A dropdown menu.
- New Escalation Level:** A dropdown menu with "Tier2" selected.
- Reason Code:** A dropdown menu with "NeedsManagerApproval" selected.
- Enter Note:** A text area with a checkbox labeled "Share with Customer". The text area contains the text: "The user wishes to speak with a manager to discuss return policy."
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

## Closing a Ticket

When you close a ticket, you indicate why the ticket was closed and enter any optional information.

1. Select the ticket.
2. Click Close Ticket from the Next Steps panel.
3. Enter the Reason and an optional Closed Ticket Note.
4. Click OK to close the ticket.

## Creating a New Ticket

To create a new ticket:

1. Select the Ticket tab.
2. Using the Next Steps panel, select, Create New Ticket. The message bar displays the number of the new ticket as being the active ticket.
3. Edit the ticket by clicking the Edit icon.
4. Click Save Ticket to save the changes you've made.

## Specifying the Current Ticket's Disposition

If you end a call, start a new call, or perform any other action that causes CSC to create a new ticket, the system displays a page where you specify what to do with the current ticket:



1. Select the radio button for the desired ticket disposition.
2. If you select Close Ticket, enter a Reason.
3. Enter an optional Ticket Note
4. Select the Share with Customer checkbox if the note is to be made available to the customer when they review their tickets.
5. Click OK to save your changes.

## Viewing Tickets Associated with a Customer

To view the tickets associated with a customer:

1. Display the customer's profile.  
The Customer Management page contains a Ticket Activity subsection that displays the ticket number, creation date, and description for each ticket associated with the customer.
2. To view an associated ticket, click on the ticket number. To work on a ticket associated with the customer, click the Work On link.

## Viewing Tickets Associated with an Order

To view the tickets associated with an order:

1. Display the order.  
Scroll to the Related Ticket section, which displays creation date, and description for each ticket associated with the order.
2. To work on the ticket click the Work on Ticket link.

## Associating a Ticket to Another Ticket

To associate another ticket with the current ticket:



1. In the Global Context Area, select the link for the ticket.  
The system displays the ticket information.
2. Edit the ticket by clicking the edit icon.
3. Select the Associate Ticket link.
4. Enter the ticket to associate.  
The system displays the related ticket in the Related Ticket panel.

### **Viewing Orders Associated with the Current Ticket**

To view the orders associated with the current ticket:

1. In the Global Context Area, select the link for the ticket.  
The system displays the ticket information. A link for each associated order appears on the Tickets menu.
2. In the Tickets menu, click the link for the order you want to view.







# 7 ATG Commerce Service Center Reports

The following reports are available for CSC using the ATG Business Control Center Reporting menu. The reports are located in the Customer Care > Agent productivity folder.

## Call Center Sales and Number of Orders by Time Comparison

This Report displays the total dollar amount of sales that were made in the Call Center, and the total number of orders process by the Call Center within the two specified time periods. For example, you can compare the sales made in July 2009 with the sales made in July 2010.

### Prompts

This report uses the following prompts:

- Time Period – Select the time period to compare.
- Number of Days to Compare – Select the number of days for the comparison to run
- Sites – If you are using a multisite environment, you can select the site(s) where the sales were made

### Report Output

This report displays both a graph and a table showing the Call Center Sales and Call Center Orders for each time period selected. It includes the following data:

- Time Periods
- Number of Orders per Time Period
- Number of Sales per Time Period
- Percentage of Change



## Call Center versus All Sales and Units

This report displays the percentage of sales that were made in the Call Center versus those initiated through other channels.

### Prompts

This report uses the following prompts:

- Time Period – Select a time period or a pre-defined date range for the report
- Group By – Select the time intervals to use for the report: Daily, Weekly, Monthly or Quarterly
- Sites – If you are using a multisite environment, you can select the site(s) where the sales were made

### Report Output

This report displays both a graph and a table showing the percentage of Call Center sales and units for each time period selected. It includes the following data:

- Time Period or Date Range
- Grouped By
- Call Center Sales – the percentage of sales sold in the Call Center versus total sales
- Call Center Units Sold – the percentage of all units sold in the Call Center versus total units sold
- Total of Call Center Units Sold
- Total of all Units Sold



- Total of all Call Center Sales
- Total of all Sales



## Average Call Center Order Size and Value

This report displays the average number of units and the value of orders processed by the Call Center.

### Prompts

This report uses the following prompts:

- Time Period – Select a time period or a pre-defined date range for the report
- Group By – Select the time intervals to use for the report: Daily, Weekly, Monthly or Quarterly
- Sites – If you are using a multisite environment, you can select the site(s) where the sales were made

### Report Output

This report displays both a graph and a table showing the average number of units and order value made by the Call Center for the time period specified. It includes the following data:

- Time Period or Date Range
- Grouped By
- Average Order Size – The average order unit size completed by the Call Center



- Average Order Value – The average order value completed by the Call Center



## Call Center Order Conversion Rate

This report displays the number of orders processed by the Call Center that became sales for the specified time frame.

### Prompts

This report uses the following prompts:

- Time Period – Select a time period or a pre-defined date range for the report
- Group By – Select the time intervals to use for the report: Daily, Weekly, Monthly or Quarterly
- Sites – If you are using a multisite environment, you can select the site(s) where the sales were made

### Report Output

This report displays both a graph and a table showing the conversion rate of Call Center calls to sales for the time period selected. It includes the following data:

- Time Period or Date Range
- Conversion Rate
- Number of Calls



- Number of Sales Converted to Orders



## Call Volume and Average Call Time

This report quantifies the average call volume and average call time for a time frame selected by the user.

### Prompts

This report uses the following prompts:

- Time Period – Select a time period or a pre-defined date range for the report
- Group By – Select the time intervals to use for the report: Daily, Weekly, Monthly or Quarterly
- Sites – If you are using a multisite environment, you can select the site(s) where the sales were made

### Report Output

This report displays both a graph and a table showing the percentage of Call Volume and Average Call Time for the time period selected. It includes the following data:

- Time Period or Date Range
- Number of Calls
- Average Call Time



## Number and Value of Returns

This report displays the total number of return transactions processed for each day within the specified time frame, as well as the total value of those returns.

### Prompts

This report uses the following prompts:

- Time Period – Select a time period or a pre-defined date range for the report
- Group By – Select the time intervals to use for the report: Daily, Weekly, Monthly or Quarterly
- Sites – If you are using a multisite environment, you can select the site(s) where the sales were made

### Report Output

This report displays both a graph and a table showing the percentage of Call Center sales and units for each time period selected. It includes the following data:

- Time Period or Date Range
- Number of Returns
- Value of Returns



## Number and Value of Discounts by Agent or Group

This report displays the total number and value of discounts on orders by Agent or Group. This report recognizes price adjustments and appeasements, but does not recognize promotions or approvals.

### Prompts

This report uses the following prompts:

- Time Period – Select a time period or a pre-defined date range for the report
- Group By – Select the time intervals to use for the report: Daily, Weekly, Monthly or Quarterly
- Agent/Group – Select all agents and all groups, or specific agents or groups

### Report Output

This report displays both a graph and a table showing the number and value of discounts by agent or group for each time period selected. It includes the following data:

- Time Period or Date Range
- Grouped By
- Number of Discounts
- Value of Discounts
- Average Value of Discounts







# Appendix A: ATG Commerce Status Codes

This appendix provides information about the status codes used in ATG 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 CSC 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.



Order Status	Description
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.
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.



Item status	Description
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.
Pending Remove	The agent has requested that the item be deleted from the order. ATG 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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