Oracle® Retail Open Commerce Platform

Customer And Order Management Base Features

Release 6.0.1

March 2015

Oracle® Retail Open Commerce Platform Customer And Order Management Base Features, Release 6.0.1

Note: The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names may exist throughout this existing documentation set.

Primary Author:

Contributors:

Contents

Note: The rebranding for the latest version of this documentation set is in development as part of post Micros acquisition activities. References to former Micros product names may exist throughout this existing documentation set.

Site Manager - Customer Service

A non-technical business user tool called Site Manager is where you will find the Customer and Order Management features under the Customer Service module. Site Manager is comprised of eight modules which allow you to manage and maintain various aspects of your website. These modules include product catalog, content management, experiences, search, customer service, reporting, users & roles, and system tools.

Customer Management

Feature / Functionality	**Description**
Create Customers	Call Center Representatives (CSRs) and Call Center Managers (CSMs) have the ability to create a new customer. The same business rules apply in the call center as apply on the site when creating new customers. A customer must have an email address as that is their user name. The agent will setup the new customer, which will cause the reset password email to be sent to the customer. Customers set their own password and do not tell the CSR their password.
View/Edit Customer Information	The following actions can be taken on an existing customer profile: • The customer's billing address can be edited through this option. • The agent can send the customer a password reset email. The agent does not have the ability to see the customer's password. • Shipping addresses within the customer's address book can be added, edited or deleted. • Customer email and email preferences can be added / changed. • Customers can be added or removed from the blacklist. A blacklist reason code is required when adding a customer to the blacklist.
Customer Notes	Notes about the customer can be entered for future reference.

Feature / Functionality	Description
Customer Purchase History	The following order information can be viewed on an existing customer profile: • All orders entered via the storefront. • All orders entered via the call center. • Items purchased in the last 365 days through any channel, provided MICROS Relate is implemented and all customer orders are stored in Relate.
Customer Loyalty Account	If MICROS Relate's Loyalty module is implemented, then the customer's Loyalty account information will be viewable within the OCP call center.
Email Signup	Email opt-ins, opt-outs, and preferred email format can be viewed and managed within the call center.
Gift Card/Certificate Balance	If MICROS Relate's Gift Card module is implemented, then CSRs can view the gift card and electronic gift certificate balances.

Order Management

Order Capture

Feature / Functionality	Description and Customizations
Create Orders	A CSR has the ability to create a new order for a customer. The interface is flexible so that either the customer can be searched for or created first or the product(s) can be selected first. Create order features: • Products can be searched for by keyword, name, or style number. • Product search results can optionally display the thumbnail product image if the agent chooses. • When a product is selected, the agent sees the same product details page as the customer would on the front end site, complete with images and cross-sells if any are set up for that product. Additionally, the inventory for each SKU is listed for the agent to help them make a decision or steer the user towards a different variant. If permitted by inventory levels and the product, agents may select in-store pickup as the delivery method. • When a product is added to the order, the up-sells for that product will display within the order entry screen so the agent can easily add one if the customer desires. • A product added to the order can have its price reduced by the agent if necessary. A reason code must be provided by the agent in this situation. The maximum amount that agents can discount the price of a product can be configured within Site Manager and controlled via roles and permissions. • A note can be added at the item level or at the order level. • A promotion code can be added to the order to trigger a promotion. • A customer can either be selected if they are already a site member or a new customer's information can be entered within the new order entry screen. • Customer look-up will also bring back non-OCP customers that have an account in Relate and CSR will be able to take and complete and order. • Multiple ship-to orders are supported within the call center. • Gift wrap and gift message are supported within the call center.

Feature / Functionality	Description and Customizations
Customer Cart-Takeover	In the event that the customer adds items to their shopping cart and then calls into the call center for help, the CSR can take over the customer's cart and complete the order for them. The customer will be directed how to obtain their cart ID from the basket page, and then the agent will look up that cart ID and the products the customer had added to their order will be transferred to a new call center order. The agent can then add additional products if the customer desires and complete the order with the customer on the phone.
Customer Blacklist	The OCP OMS maintains a customer blacklist, which is adminable by CSMs. Customers can be added or removed from the blacklist from within the call center. When an order is placed through the call center, the customer information will be matched against the blacklist and matching orders will automatically be placed on hold.
Shipping Methods and Shipping Charge Calculation	The standard shipping charges are calculated by ship-method, based on the value of merchandise ordered using user-defined rate tables. The shipping charge is calculated by OCP.
Tax Calculation	Tax is calculated via a zip code based tax table which stores a single tax percentage per zip code. The tax percentage does not vary by product type. Products can be marked as tax exempt through Site Manager if tax should not be applied to certain products. A third party tax package could be integrated as a customization with {CLIENT NAME} responsible for setting up an agreement with the desired vendor. Should {CLIENT NAME} elect to use a third party tax package, specific configurations and options will be discussed during the BIA.

Feature / Functionality	Description and Customizations
Payment Methods	The following payment methods are supported for CSR -created orders: • Standard credit cards are supported as viable payment methods. Credit cards will be authorized through CyberSource. {CLIENT NAME} is responsible for the contract with Cybersource and must provide the account information to Micros. • PayPal. {CLIENT NAME} is responsible for setting up agreement with PayPal. Should {CLIENT NAME} elect to use PayPal, specific configurations will be discussed during the BIA. • MICROS Relate gift cards and electronic gift certificates (if {CLIENT NAME} has MICROS Relate's Gift Card module). • MICROS Relate Loyalty rewards (if {CLIENT NAME} has MICROS Relate's Loyalty module).
Fraud Protection	The OCP OMS includes an optional integration with CyberSource's Decision Manager offering for fraud protection. If enabled, all new orders, order edits, and payment authorizations will be screened for possible fraud via Decision Manager. {CLIENT NAME} is responsible for the contract with Cybersource and must provide the account information to Micros.
Order Notes	Notes about the order can be entered for future reference. Notes can be entered at an order and order line level.
Order Review	Allows an agent to review an order with a customer before creating an order.

Order Maintenance

Feature / Functionality	Description and Customizations
Order Lifecycle – Order Level Status	The OCP OMS includes the following order statuses: • New. An order that has just been created through the OCP Website or Call Center and is not on Hold. • Open. An order that has had an action against it and is not on hold, in process, completed or canceled. The order will have gone through an edit, been released from hold or sent to the WMS. • Hold. An order is held when the system applies some type of hold on the order or the order entry operator places an order on hold by selecting a configurable user-defined hold reason code. • In Process. An order that has been submitted to the WMS for fulfillment. • Canceled. An order is canceled when you have canceled each item individually or the entire order. A cancel can be performed against open orders, orders on hold or orders that the WMS has acknowledged can be voided. • Completed. An order is completed when all the items on the order are shipped, or some combination of shipped, canceled, partial returned or returned.

Feature / Functionality	Description and Customizations
Order Lifecycle – Line Level Status	The OCP OMS includes the following order line statuses: • Open. An order line that is currently open and reserved and was placed online or through the OMS. Order items with a status of "Open" are created through a new order, when a line is added to an existing order, when an item is edited, or when an item is exchanged. • Backorder. An order line that is currently open and no inventory is available for reservation. A variant must be flagged as eligible for backorder. • Preorder. An order line that is currently open and no inventory is available for reservation. A variant must be flagged as eligible for pre-order. • In Process. An order line that has been submitted to the WMS for fulfillment. An edit can be performed against orders that the WMS has confirmed can be voided (Refer to WMS Void Request Process). • Canceled. An order line that has been fully canceled. • Shipped. An order line that has been fully shipped. • Partial Return. A partial quantity on the order line has been returned or exchanged. The return/exchanged quantity must be less than the quantity shipped. • Return. An order line where the original shipped quantity has been fully returned. A return is also performed as part of an exchange.
Order Search	CSRs have the ability to search for orders by: • Start Date / End Date • Order Status, including hold reason code • Order Number • Rewards number (requires Relate Loyalty) • Customer Email Address • Order Billing Address • Order Shipping Address Orders search operates against the orders in the OCP database.

Feature / Functionality	Description and Customizations
View/Access Orders	The Order Search result screen displays order summary information and order status. Each order can be easily accessed from this screen. Summary information displayed includes the billing name, order number, order date, order status, hold reason, and the total order amount. Detailed information for a given order is also accessible by selecting a given order from this screen. Tracking numbers, if provided, are displayed on the order detail screen once the agent has selected a particular order.
Order Edits	CSRs can edit order information after an order has been placed, provided the order is not currently at the warehouse or store for fulfillment and therefore has an order status of “In Process”. When an order is edited, it is “locked” by the CSR and no other CSR can edit the same order at the same time. CSRs are able to edit the following information on an existing order: • Item price • Item quantity • Items being purchased (i.e. add/remove items) • Billing address • Shipping address • Payment method The following rules apply to the order edit functionality: • When an order is edited, tax and shipping charges will be recalculated when necessary. • Promotions are not affected by an order edit. This means that all item, order, and shipping level discounts originally assigned to the order will remain in effect. In the case of percentage discounts, the percentage off will remain constant, not the dollar amount. • If the order value increases as a result of an order edit, the original payment authorization will be reversed and a new authorization will be processed, including fraud screening. • If necessary, CSRs will be prompted for additional payment during the order edit process.

Feature / Functionality	Description and Customizations
Order Hold	Orders can be placed on hold for multiple reasons. The OCP OMS will automatically place orders on hold for the following reasons: • Declined credit card authorization after the order has initially been placed. This would typically occur when the OMS attempts to reauthorize an order after the original authorization has expired. • CyberSource Decision Manager fraud review. This will occur when Decision Manager returns a result of "Review" when the order is sent for fraud review. In the case of a reauthorization attempt after the order has been placed, this will also occur when Decision Manager returns a result of "Reject". • Blacklist match. This will occur when a customer on the merchant's blacklist attempts to place an order. Orders can also be manually placed on hold by CSMs. When orders are placed on hold, a hold reason code is required. Hold reason codes are configurable from the OMS tab within the Site Configurations area of Site Manager. CSMs can release holds by providing a release reason code, with the exception of Decision Manager holds. Decision Manager holds are managed within CyberSource's Decision Manager system, which will then send a status update to the OMS, which will release the hold.
Order Cancelation	Order lines can be canceled, provided they have not been shipped and are not currently "In Process" at the warehouse or store for fulfillment. Complete orders can be canceled, provided all order lines meet these criteria. When an order is canceled, CSMs will provide a cancel reason code, which are configurable from the OMS tab within the Site Configurations area of Site Manager.

Feature / Functionality	Description and Customizations
Returns	Returns can be applied against shipped items. Returns will be initiated through the Call Center where a CSR will issue a Return Merchandise Authorization (RMA). When issuing an RMA, CSRs will select a return reason code, which will determine if freight charges are to be credited in addition to the merchandise amount. Return reason codes are configurable from the OMS tab within the Site Configurations area of Site Manager. Once the RMA has been issued, the customer will send the items to the warehouse and the warehouse will alert the OMS that the items have been received. Once the items are received, the OMS will issue a credit to the customer. Credits are returned as follows: • If the order was purchased via a gift card or electronic gift certificate (EGC), a new EGC will be issued for the return. • If the order was purchased via a credit card or a credit card/gift card/EGC combination, the return will always be credited to the credit card used • If the order was placed using PayPal or a combination of PayPal and a gift card/EGC, PayPal will always be credited if within the designated timeframe. If it's outside of the designated timeframe, then a new EGC will be issued for the return.
Appeasements	CSMs can issue appeasements as fixed dollars or as a percentage of the merchandise based on appeasement rules configured from the OMS tab within the Site Configurations area of Site Manager. When issuing an appeasement, CSMs must select an appeasement reason code, which are configurable from the OMS tab within the Site Configurations area of Site Manager. When issuing an appeasement, the CSM can note whether the appeasement should be issued in the form of an EGC, a credit card credit using the same credit card that was used for the original purchase, or a credit card credit against a newly entered credit card.
Order Notes	Notes about the order can be entered for future reference. Notes can be entered at the order and order line level.

Feature / Functionality	Description and Customizations
Transaction History	CSRs can view a complete transaction history from the Order Details and Order Edit screens within the Call Center. All significant order events are logged here, such as: • Payment authorization completed • Backorder or preorder inventory reserved • Order edit details • Order cancellation details • Order placed on hold • Order released from hold • Order sent to the WMS for processing • Shipment information received • Return processed • Appeasement processed • Email sent
Payment Reauthorization	When payment authorizations expire, the OCP OMS will automatically reauthorize payment for any remaining, unfulfilled order balance. Reauthorizations go through the same blacklist and fraud checking processes conducted on new orders via Cybersource. Orders will automatically be put on hold based on the rules defined in the "Order Hold" section above. {CLIENT NAME} is responsible for the contract with Cybersource and must provide the account information to Micros.
Payment Settlement	The OCP OMS will settle payments for shipped items, appeasements, and received returns via Cybersource. Settlements require a valid payment authorization. {CLIENT NAME} is responsible for the contract with Cybersource and must provide the account information to Micros.

Order Fulfillment

<table>
<tr><th>Feature / Functionality</th><th>Description and Customizations</th></tr>
<tr><td>Omni-Channel Scenarios</td><td>The OMS supports the following omni-channel fulfillment scenarios:
Buy online, ship from distribution center
Buy online, ship from store
Buy online, in-store pickup
Buy in-store, ship from distribution center</td></tr>
<tr><td>Warehouse Management System Integration</td><td>The OCP OMS provides a standard integration for a warehouse management system (WMS). The following information is passed to the WMS from the OMS:
Order line items ready for fulfillment
RMAs that have been created
The following information is passed from the WMS to the OMS;
Inventory updates
Order line status updates (primarily shipment notifications)
Return receipt notifications
The WMS integration can be configured to either automatically backorder or cancel items that were expected to be shipped, but were unable to be fulfilled.

In addition to the WMS integration, the OCP OMS also interfaces with MICROS Locate to facilitate ship-from-store and in-store pickup orders. See the Locate Functional Overview for more information on this integration.</td></tr>
<tr><td>Innotrac Integration</td><td>The OCP OMS supports integration with Innotrac (http://www.innotrac.com/). Innotrac provides outsourced warehouse management and fulfillment services. The Innotrac integration can be turned on or off within Site Manager.

{CLIENT NAME} is responsible for the contract with Innotrac and must provide the account information to Micros</td></tr>
</table>

Order Emails

Feature / Functionality	**Description and Customizations**
Order Confirmation	When an order is placed via the Call Center, an order confirmation email will be sent to the customer. This is the same order confirmation email that the customer would receive if they placed the order via the storefront.
Shipping Confirmation	When a customer's order or part of their order has shipped, the customer receives a shipping confirmation notice via email.
Store Pickup Confirmation	When a customer has picked up all items from a store, the customer receives a confirmation notice via email (requires Locate integration).
Return Confirmation	When an item is returned, the customer will receive confirmation of merchandise receipt and refund processing.
Appeasement Notification	When an appeasement is issued, the customer will receive confirmation of the appeasement via email.
Order Cancelation Notification	When an order is canceled, the customer will receive confirmation of the cancelation via email.
Item Cancelation Notification	When one or more items on an order are canceled, the customer will receive confirmation of the cancelation via email.
Item Still on Backorder	When one or more items in an order remain on backorder, this reminder email can be sent to the customer to remind them of the status of those items.
Store Pickup	When items purchased for store pickup are ready to be picked up, the customer receives notice via email (requires Locate integration).
Store Pickup Reminder	When items purchased for store pickup have not been picked within the specified number of days, the customer receives notice via email (requires Locate integration).
Refund Via Electronic Gift Certificate	When a refund is issued via an electronic gift certificate (if Relate's Gift Card module is implemented), the recipient receives an email with the details of the gift certificate.

Order Exports

Feature / Functionality	Description and Customizations
Sales Audit Exports	The OCP OMS will issue a sales audit export feed, which is intended to be imported into a merchant's financial reporting system.
Sending Closed Transactions to Relate	If the Relate integration is turned on, the OCP OMS will send information regarding completed transactions, both new sales and returns, to Relate on a regular basis. This feed is used to update a customer's purchase history and to ensure the proper accrual of Loyalty points.

Reports

Feature / Functionality	Description and Customizations
Reports	The following reports are available in the OCP OMS: • Order Status • Appeasements • Returns • Net Sales • Price Overrides • Orders Not Settled

Administration

Feature / Functionality	Description
Manage Call Center Users	Call Center users can be managed via Site Manager. They can be added, modified, or deleted.
Manage Responsibilities	This feature allows assigning specific responsibilities to a role (access to specific functionality).
Manage Roles	Call Center users can be assigned to specific roles. The following roles are supported: • Customer Service Representative • Customer Service Manager • System Administrator
Reason Codes	All reason codes can be managed via Site Manager. These include the following reason codes: • Blacklist • Hold • Hold Release • Cancel • Return • Appeasement
Order Remorse Period	The order remorse period is the period of time between order placement and when the order is eligible to be sent to the warehouse or store for order fulfillment. The remorse period is intended to give the customer a chance to change or cancel their order prior to the order being sent out for fulfillment. The order remorse period is configurable within Site Manager.
WMS Short Ship	The OMS can be configured to either cancel or place orders on hold that are unexpectedly unable to be fulfilled.

Feature / Functionality	**Description**
Decision Manager	The Cybersource Decision Manager integration for fraud screening can be turned on and off via Site Manager. {CLIENT NAME} is responsible for the contract with Cybersource and must provide the account information to Micros
Appeasement Rules	Administrators can define the rules associated with appeasements. Specifically, they can define the level of appeasement allowed to be issued by each role.
Price Adjustment Rules	Administrators can define the rules associated with price adjustments. Specifically, they can define the level of adjustment allowed to be issued by each role.
Loyalty Award Redemption Rules	Administrators can define whether or not Loyalty awards can be the sole payment type on an order as well as the maximum amount of an order allowed to be paid for with Loyalty awards.