Oracle® Retail Collect and Receive Foundation Cloud Service
User Guide

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Oracle® Retail Collect and Receive Foundation Cloud Service User Guide

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Preface

The *Oracle® Retail Collect and Receive Foundation Cloud Service User Guide* describes all available functions of this release.

Audience

This guide is for technical personnel who configure, maintain and support, or use Collect and Receive Foundation Cloud Service.

Documentation Accessibility

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- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.

Convention	Meaning
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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1
Introduction

The Collect and Receive Foundation Cloud Service provides premier delivery options, bringing together Oracle's application expertise and cloud infrastructure with Uber's extensive network of drivers and cutting-edge logistics technology to offer reliable and cost-effective same-day and scheduled delivery services. Whether bookings are taken via the Collect and Receive user interface or through an external system leveraging Collect and Receive's base APIs, the solution facilitates the booking of an Uber courier for on-demand delivery options. Collect and Receive provides a differentiated experience by enabling businesses to improve operations with a streamlined method to meet the growing demand for faster and more convenient delivery options.

2

Getting Started

This chapter provides an introduction to accessing and using Oracle Retail Collect and Receive. The following topics are covered in this chapter:

- Login
- Ask Oracle
- Navigation Menu
- User Menu

Login

To log in to the Collect and Receive application:

1. Start the application, by opening a web browser. Enter the URL for your Collect and Receive application. The login page appears.

2. Enter your username and password and click **Sign In**. The Delivery Metrics page is displayed. For more information about this page, see the Delivery Metrics section.

Ask Oracle

The Ask Oracle icon in the lower right corner of the Collect and Receive page opens the Ask Oracle page. The Ask Oracle page allows you to navigate in the available Navigation Menu and User Menu.

> **Note:**
>
> The Ask Oracle option is not available when you create a delivery.

Figure 2-1   Ask Oracle

- The Navigation Menu provides a list of all pages you can access within the Collect and Receive app. For more information, see the Navigation Menu section.
- The User Menu allows you to set preferences, view the About Application page, access Application Help and sign out. For more information, see the User Menu section.

To return to the previous page, click the **X** close button.

Navigation Menu

The Navigation Menu provides a list of all pages that you can access within Collect and Receive.

> **Note:**
>
> You can also search the Navigation Menu by using the Ask Oracle search at the top of the Navigation Menu.

Select one of the following navigation options:

- Delivery Metrics/Landing Page

  The Delivery Metrics page is the Landing Page after a successful login. On the Delivery Metrics page, you can view metrics for all the locations in a business or view metrics for a selected or preferred location.

- Start/Create a Delivery

  The Create Delivery option takes you to a guided process that allows you to create an outbound or inbound delivery.

- Outbound Deliveries

Use the Outbound Deliveries page to view, search and filter outbound deliveries assigned to your preferred or a selected location.

- Inbound Deliveries

  Use the Inbound Deliveries page to view, search and filter inbound deliveries assigned to your preferred or selected location.

- All Deliveries

  Use the All Deliveries page to view, search and filter all deliveries (inbound and outbound) across all locations or a selected location.
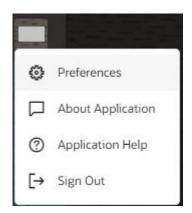
- Foundation Data

  Use Foundation Data page to manage foundation related data within your business.

User Menu

The User Menu is located in the top right corner of the Ask Oracle page. The menu is displayed with the user's initials. The User Menu contains the following options:

Figure 2-2   User Menu

- Preferences
- About Application
- Application Help

  Opens the Online Help.
- Sign Out

Preferences

The Preferences page allows you to change your locale and set a preferred location.
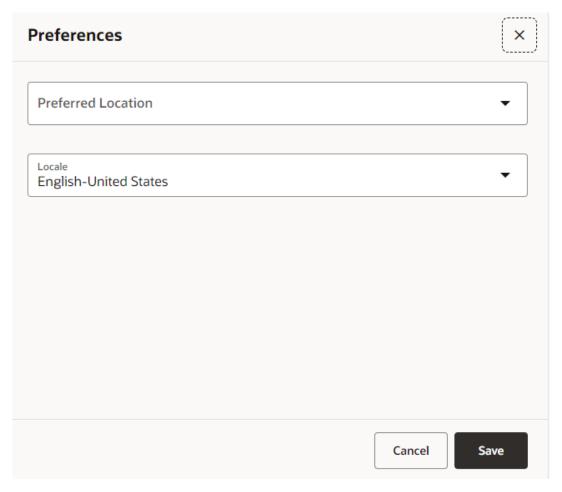
To set your preferences follow the steps below:

1. From the Delivery Metrics page/Landing page select the **Ask Oracle** icon in the lower right corner. The Ask Oracle page appears.

2. Click on the User Menu in the upper right corner of the page. The User Menu is displayed with the user's initials.

3. Select the **Preferences** option. The Preference page appears.

Figure 2-3   Preferences Page

4. In the Preferred Location field, select a location from the list.
5. In the Locale field, choose the locale you need.

> ✎ **Note:**
>
> The Locale field is your location by default. You can change the locale, if necessary.

6. Then select one of the following options:
   - Select **Save** to keep your entries. Once saved, the Preferences page and Ask Oracle page will close.
   - Select **Cancel** to reject the changes. One canceled, the Preferences page and the Ask Oracle page will close.

About Application

The About Application page provides details of the application such as system information, copyright information and so on.

To view the About Application page:
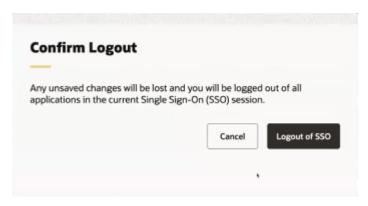
1. From the Delivery Metrics page/Landing page select the **Ask Oracle** icon in the lower right corner. The Ask Oracle page appears.

2. Click on the User Menu in the upper right corner of the page. The User Menu is displayed with the user's initials.

3. Select the **About Application** option. The About Application page appears.

4. Select **Done** to close the About Application page.

Sign Out

The Sign Out option allows you to log out. It is accessible from the User Menu.

1. From the Delivery Metrics page/Landing page select the **Ask Oracle icon** in the lower right corner. The Ask Oracle page appears.

2. Click on the User Menu in the upper right corner of the page.

3. Select the **Sign Out** option. You are prompted to confirm the logout. The Confirm Logout message is displayed.

Figure 2-4   Confirm Logout

4. Click **Logout of SSO** to log out and close the Collect and Receive app.

> **Note:**
>
> All applications in the current Single Sign-On (SSO) session are signed out. To remain logged in, select **Cancel**.

5. The Sign Out Successful message is displayed.

3

Delivery Metrics / Landing Page

After a successful login, the Delivery Metrics page appears. This page allows you to view metrics for all the locations in a business or to filter/drill down to a specific or preferred location.

- Delivery Metrics for All Locations
- Delivery Metrics for a Selected/Preferred Location

Delivery Metrics for All Locations

By default the Delivery Metrics page shows the metrics for all locations, as indicated by the All Locations link below the heading section.

> ✎ **Note:**
>
> You can also access this page by selecting the Delivery Metrics option from the Ask Oracle menu.

If you have a preferred location, the link will show your location description and the corresponding location code, for example, East Location (Loc4). For more information about how to view delivery metrics for a specific location, see the Delivery Metrics for a Selected Location section.

> ✎ **Note:**
>
> The metrics total counts are not updated automatically. The page needs to be refreshed to retrieve the updated total counts. The total counts are updated every 15 minutes.

Figure 3-1   Delivery Metrics Page — All Locations

Below the page header, a filter displays. The available filter options are:

- Custom Date Range

  Enter the Start and End Date.

- Today

- Yesterday

- Month to Date

- Year to Date

By default the filter is set to Today.

The Total of each available Metric Type, like Created, Completed, Canceled and Returned, is displayed in the All Deliveries card for the filter set above.

In the Deliveries by Metric card, the pie chart illustrates the Total of each available Metric Type as percentage of the total count of deliveries based on the date range selected in the filter. By hovering over the chart, you can view the percentage for each Metric Type. A legend for the Metric Types, Created, Completed, Canceled, and Returned is displayed.

In addition to seeing delivery metrics, you can navigate to the following pages to view deliveries or create a delivery, for example.

- To view deliveries, select one of the following options in the View Deliveries drop-down list:

  - Outbound Deliveries

    Lists all outbound deliveries assigned to your preferred or a selected location. Most commonly, these are deliveries being sent from a store for delivery to a customer.

  - Inbound Deliveries

Lists all inbound deliveries assigned to your preferred or a selected location. Most commonly, these are merchandise returns being picked up from a customer and delivered back to a store.

– All Deliveries

Lists all outbound and inbound deliveries for all locations or a selected location.

For more information about how to view deliveries, see the Searching & Filtering Lists of Deliveries chapter.

• To create a new delivery, select the **Create Delivery** button. For more information about how to create a delivery, see the Create a Delivery section.

• To navigate to any available menu within the Collect and Receive application, open **Ask Oracle**. For more information about Ask Oracle, see the Ask Oracle section.

Delivery Metrics for a Selected Location
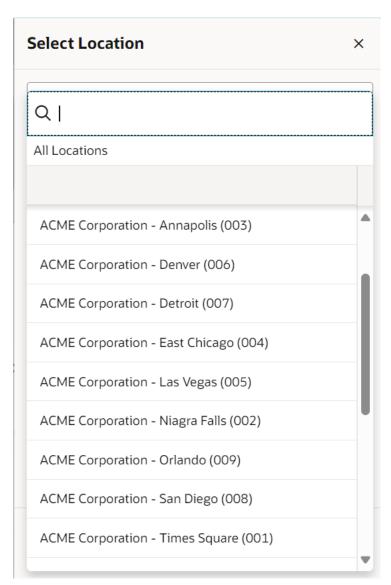
Selecting a Location

To view the delivery metrics for a specific location, follow the steps below:

1. When you click on the location link, the Select Location window opens.

Figure 3-2   Select Location Window

2. In the Locations field, select or search for a location in the list. This is a required field.

3. Then select one of the following options:

   • Click **Apply** to close the Select Location window. The Delivery Metrics page will refresh to display the metrics for the selected location.

   • Click **Cancel** to reject all changes and to close the Select Location window.

Viewing Delivery Metrics for a Selected Location

When you selected a location, the link will show your location description and the corresponding location code, for example, East Location (Loc4).
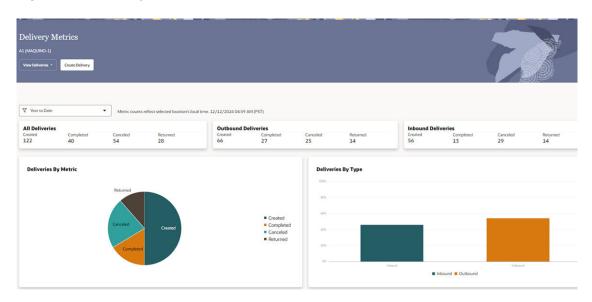
Figure 3-3   Delivery Metrics for a Selected Location

Below the page header, a filter displays. The available filter options are:

*   Custom Date Range

    Enter the Start and End Date.

*   Today

*   Yesterday

*   Month to Date

*   Year to Date

By default the filter is set to Today.

The deliveries for the selected location are grouped into the following cards below the filter:

*   All Deliveries

*   Outbound Deliveries

*   Inbound Deliveries

The total of each available Metric, like Created, Completed, Canceled and Returned, is displayed for each group.

In the Deliveries by Metric card, the pie chart illustrates the total of each available Metric as percentage of the total count of deliveries based on the location and the date range selected in the filter. By hovering over the chart, you can view the percentage for each Metric. A legend for the Metric Types, Created, Completed, Canceled, and Returned, is displayed.

In the Deliveries by Type card, the chart shows the total of each available Delivery Type, like Inbound and Outbound, as percentage of the total count of deliveries based on the location and the date range set in the filter above. By hovering over the chart, you can view the percentage for each Delivery Type. A legend for the Delivery Types, Inbound and Outbound, is displayed below the chart.

Viewing Inbound, Outbound or All Deliveries

In addition to seeing delivery metrics, you can navigate to the following pages to view deliveries or create a delivery, for example.

- To view deliveries, select one of the following options in the View Deliveries drop-down menu:

  – Inbound Deliveries

    Lists all inbound deliveries assigned to your preferred or a selected location. Most commonly, these are merchandise returns being picked up from a customer and delivered back to a store.

  – Outbound Deliveries

    Lists all outbound deliveries assigned to your preferred or a selected location. Most commonly, these are deliveries being sent from a store for delivery to a customer.

  – All Deliveries

    Lists all outbound and inbound deliveries for all locations or a selected location.

  For more information about how to view deliveries, see the Searching & Filtering Lists of Deliveries chapter.

- To create a new delivery, select the **Create Delivery** button. For more information about how to create a delivery, see the Create a Delivery section.

- To navigate to any available menu within the Collect and Receive application, open **Ask Oracle**. For more information about Ask Oracle, see the Ask Oracle section.

4

Create a Delivery

To create an inbound or outbound delivery, you need to complete the following steps:

- Start a Delivery
- Pickup and Dropoff Information
- Package Details
- Scheduling and Proof of Delivery

> **Note:**
>
> If at any time you want to go back to a prior step, click the step name in the right-hand panel.
>
> As steps are completed, a check mark displays next to each step in the right-hand panel.

> **Note:**
>
> The Collect and Receive Status Notification Webhook can be leveraged and used to facilitate and trigger communication to the sending and/or receiving parties of a delivery. For more information, see the Leveraging the Status Notification Webhook for Delivery Communications section in the *Collect and Receive Foundation Cloud Service Web Services Guide*.

Start a Delivery

To start a delivery, follow the steps below:
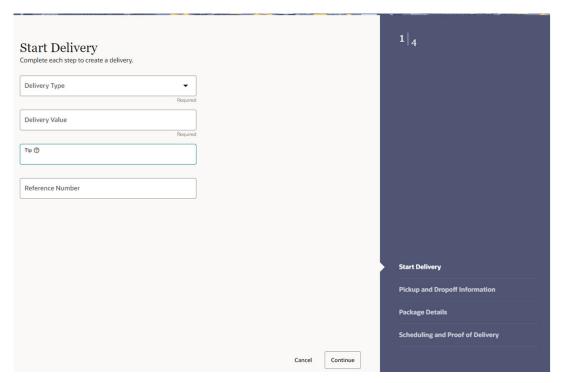
1. Select the **Create Delivery** button on the Delivery Metrics, Inbound, Outbound and All Deliveries page or select **Create Deliveries** from the Ask Oracle navigation menu. The Start Delivery page appears.

> **Note:**
>
> Click on the step indicator to minimize/collapse the step panel to create more space for the main page. This is helpful if you enlarge the view or use different screen resolutions.

Figure 4-1   Start Delivery

2. In the Delivery Type field, select the **Outbound** or **Inbound** delivery option. This is a required field.

    •   Select Outbound when a delivery will be leaving your store/business location. Most commonly, this is selected when sending merchandise from a store to a customer.

    •   Select Inbound when a delivery will be coming into your store/business location. Most commonly, this is selected when needing to pickup return merchandise from a customer and deliver it back to a store.

3. In the Delivery Value field, enter the amount of the delivery. This is a required field.

    This is the total value of the items/assets in the delivery. This is captured for insurance purposes with the courier.

4. In the Tip field, enter the amount of the tip paid to the courier.

5. In the Reference Number field, enter the reference number of the delivery.

    The reference number might be an Order number or a PO number.

6. Then choose one of the following options.

    •   Click **Continue** to continue with the next step Pickup and Dropoff Information.

    > ✎ **Note:**
    >
    > All required fields must be completed to proceed to the next step.

    •   Click **Cancel** to reject all entries and close the page. When prompted, click **Yes** to confirm cancellation of the delivery. You are redirected back to the page you left when you started the Create Delivery process.

Pickup and Dropoff Information

The Pickup/Dropoff Information differs, depending on whether you have selected an inbound or outbound delivery in the first step.

- Pickup/Dropoff Information Inbound Deliveries
- Pickup/Dropoff Information Outbound Deliveries

Pickup and Dropoff Information — Inbound Deliveries

If you selected the delivery type Inbound Deliveries in the first step, follow the steps below:
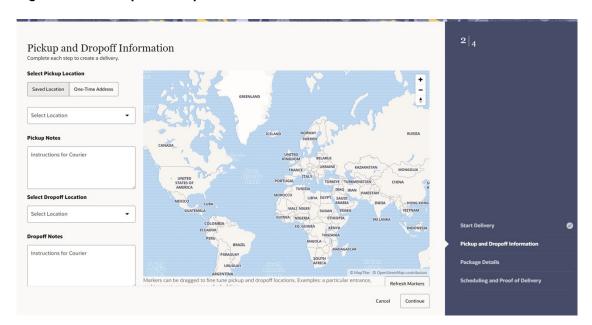
Figure 4-2   Pickup and Dropoff Information — Inbound Deliveries

1. In the Select Pickup Location section, select one of the following options:

   - Select **Saved Location** to choose a business location within your company and start typing the location to search for the specific location in the drop-down list.

     The Saved Locations are the business locations that are managed via the Locations page. For more details about the Locations page, see the Manage Locations section.

     The address for the selected location is displayed in the Pickup Contact and Address section and a marker is dropped on the map showing the pickup location. To edit the Pickup Contact and Address information, see the Edit Contact and Address section.

   - Select **One-Time Address** to enter a one-time address for this delivery. The input fields are displayed. The Address Finder field can be used to suggest addresses or complete the form manually. Enter all required fields. A marker is dropped on the map showing the pickup location.

     One-Time address should be used for customer, client, or addresses that are external to your business.

> **Note:**
>
> If you type in/update a One-Time Address without using the Address Finder field, you need to click the **Refresh Markers** button to make the marker appear on the map.

2. In the Pickup Notes section, enter instructions for the courier. For example, pickup at the side door.

> **Note:**
>
> If a Saved Address is selected and has associated delivery instructions, the pickup notes are prepopulated with those instructions. For more information about how to add delivery instructions to a location, see the Manage Locations chapter.

3. In the Select Dropoff Location section, select a location from the Select Location dropdown list or begin typing the location to search for the specific location in the list. The address for the selected location is displayed in the Dropoff Contact and Address section and a marker is dropped on the map showing the dropoff location. To edit the Dropoff Contact Address information, see the Edit Contact and Address section.

> **Note:**
>
> If you set a preferred location, it is defaulted as the Dropoff Location.

4. In the Dropoff Notes section, enter instructions for the courier.

> **Note:**
>
> If the Location has associated delivery instructions, the dropoff notes are prepopulated with those instructions.

5. On the map, click the Pickup or Dropoff Marker to see an information box with the detailed address. If necessary, you can zoom the map and then click, hold, and drag the marker(s) to fine tune the pickup or dropoff spot. This is helpful if the courier needs to go to a specific entrance, parking lot, or corner of a building.

6. Then choose one of the following options.

   - Click **Cancel** to reject all entries and close the page. When prompted, click **Yes** to confirm you want to cancel the delivery.

   - Click **Continue** to continue with the next step Package Details.

> **Note:**
>
> When clicking **Continue**, the system validates all required fields and determines if the provided addresses are serviceable by the courier. If the validation fails or the address is not serviceable, an error message displays. An exclamation mark also appears next to the name of the current step in the right panel. To edit or change a one-time address, edit the fields in the form. For a saved location, use the Edit Contact and Address option or select a new Saved Location.

Pickup and Dropoff Information — Outbound Deliveries

If you selected the delivery type Outbound Deliveries in the first step, follow the steps below:
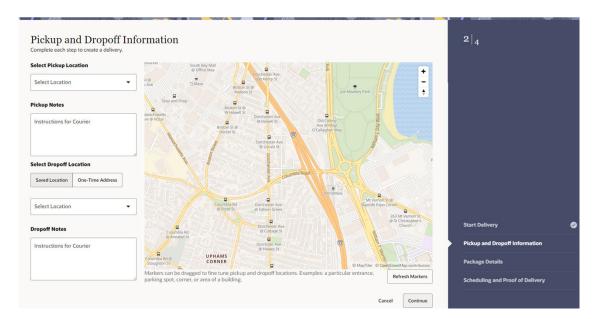
Figure 4-3   Pickup and Dropoff Information — Outbound Deliveries

1. In the Select Pickup Location section, select a location from the **Select Location** dropdown menu and begin typing the location to search for the specific location in the list. The address for the selected location is displayed in the Pickup Contact and Address section and a marker is dropped on the map showing the pickup location. To edit the Pickup Contact Address information, see the Edit Contact and Address section.

   > **Note:**
   >
   > If you set a preferred location, it is defaulted as the Pickup Location.

2. In the Pickup Notes section, enter instructions for the courier.

> **Note:**
>
> If the Location has associated delivery instructions, the pickup notes are prepopulated with those instructions.

3. In the Select Dropoff Location section, select one of the following options:

    • Select **Saved Location** to choose a business location within your company or start typing the location to search for the specific location in the drop-down list. The address for the selected location is displayed in the Dropoff Contact and Address section and a marker is dropped on the map showing the Dropoff location. To edit the Dropoff Contact and Address information, see the Edit Contact and Addres section.

    • Select **One-Time Address** to enter a one-time address for this delivery. The input fields are displayed. The Address Finder field can be used to suggest addresses or complete the form manually. Enter all required fields. A marker is dropped on the map showing the dropoff location.

    A One-Time address should be used for customer, client, or addresses that are external to your business.

    > **Note:**
    >
    > If you type in/update a One-Time Address without using the Address Finder field, you need to click the **Refresh Markers** button to make the marker appear on the map.

4. In the Dropoff Notes section, enter instructions for the courier.

    > **Note:**
    >
    > If a Saved Address is selected and has associated delivery instructions, the dropoff notes are prepopulated with those instructions.

5. On the map, click the Pickup or Dropoff Marker to see an information box with the detailed address. If necessary, you can zoom the map and then click, hold, and drag the marker(s) to fine tune the pickup or dropoff spot. This is helpful if the courier needs to go to a specific entrance, parking lot, or corner of a building.

6. Then choose one of the following options.

    • Click **Cancel** to reject all entries and close the page. When prompted, click **Yes** to confirm you want to cancel the delivery.

    • Click **Continue** to continue with the next step Package Details.

> **✎ Note:**
>
> When clicking **Continue**, the system validates all required fields and determines if the provided addresses are serviceable by the courier. If the validation fails or the addresses are not serviceable, an error message displays. An exclamation mark also appears next to the name of the current step in the right panel.
>
> To edit or change a one-time address, edit the fields in the form. For a saved location, use the Edit Contact and Address option or select a new Saved Location.

Edit Contact and Address
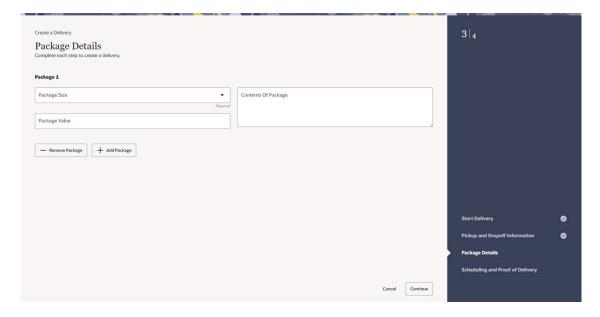
To edit the contact information, follow the steps below:

1. Click **Edit** in the Contact and Address section. The Edit Contact Information window appears.

2. Edit the values as required.

3. Then select one of the following options.

   • Click **Close** to close the Edit Contact Information without applying any changes.

   • Click **Apply** to validate all required fields and update the Contact Information and return to the Pickup and Dropoff Information step.

Package Details

To enter the package details for the current delivery, follow the steps below:

Figure 4-4   Package Details

1. In the Package 1 section, select the Package Size from the dropdown menu. This is a required field.

   > **Note:**
   >
   > The list of values displayed in the Package Size dropdown menu are the values that are configured in the Foundation Data - Package Dimensions Setup. For more information, see the Configure Package Dimensions section.

2. In the Package Value field, enter the value of the current package.

3. In the Contents of Package field, enter what the package consists of.

4. If there are more packages, select the **Add Package** button and enter the package details. Do this for all packages of the current delivery. You can add up to five packages to a delivery.

   > **Note:**
   >
   > The most recently added package can be removed by selecting the **Remove Package** button.

5. Then choose one of the following options.

   • Click **Cancel** to reject all entries and close the page. When prompted, click **Yes** to confirm you want to cancel the delivery.

   • Click **Continue** to continue with the next step Scheduling and Proof of Delivery.

Scheduling and Proof of Delivery

The Scheduling and Proof of Delivery page differs, depending on whether you have selected inbound or outbound delivery in the first step.

• Scheduling and Proof of Delivery — Inbound Deliveries

• Scheduling and Proof of Delivery — Outbound Deliveries

Scheduling and Proof of Delivery — Inbound Deliveries

To schedule and select proof of delivery options for an inbound delivery, follow the steps below:

Figure 4-5   Scheduling and Proof of Delivery — Inbound Deliveries

1. In the Select Pickup Window section, select the date and the time. These fields are required.

    > **Note:**
    >
    > The date and time selected is the local date/time for the delivery area, using the dropoff location.

2. In the Contactless Delivery section, enable the **Delivery is Contactless** option, if requested.

3. In the Proof of Delivery section, enable the following options if necessary:

    > **Note:**
    >
    > If you enabled the Contactless Delivery option, some proof of delivery options are not available for certain selections.

    a. **Picture Required**

    b. **Signature Required**

    c. **Age Verification**

If the Age Verification option is enabled, enter the minimum age of the recipient in the field below.

d. In the Undeliverable Preference section, select your preference from the dropdown menu in case the packages cannot be delivered. This is a required field.

Below option is available for inbound deliveries:

- Return to Pickup Location — This is the default option.

4. Then choose one of the following options.

- Click **Cancel** to reject all entries and close the page. When prompted, click **Yes** to confirm you want to cancel the delivery.

- Click **Submit** to create the delivery. The system validates all entries. Then the system returns to the page where you started the Create a Delivery process. A message is displayed that the delivery has been successfully created.

Scheduling and Proof of Delivery — Outbound Deliveries

To schedule and select proof of delivery options for an outbound delivery, follow the steps below:

Figure 4-6   Scheduling and Proof of a Delivery — Outbound Deliveries

1. In the Select Dropoff Window section, select the date and the time. These fields are required.

> **✎ Note:**
>
> The date and time selected is the local date/time for the delivery area, using the pickup location.

2. In the Contactless Delivery section, enable the **Delivery is Contactless** option, if requested.

3. In the Proof of Delivery section, enable the following options if necessary:

> **✎ Note:**
>
> If you enabled the Contactless Delivery option, some proof of delivery options are not available for selection.

a. **Picture Required**

b. **Signature Required**

c. **Age Verification**

   If the Age Verification option is enabled, enter the minimum age of the recipient in the field below.

d. In the Undeliverable Preference section, select your preference from the dropdown menu in case the packages cannot be delivered. This is a required field.

   The following options are available for outbound deliveries:

   • Return to Pickup Location — This is the default option.

   • Leave at Door

4. Then choose one of the following options.

   • Click **Cancel** to reject all entries and close the page. When prompted, click **Yes** to confirm you want to cancel the delivery.

   • Click **Submit** to create the delivery. The system validates all entries.

     – You are prompted to print the package labels.

       Figure 4-7   Print Package Labels Prompt

* If you open the Package Label link, a new browser tab opens containing package label(s) for you to print.

Figure 4-8   Example — Package Label

* After printing all package labels, click **OK** to close the Print Package Labels prompt. The system returns to the page where you started the Create a Delivery process. A message is displayed that the delivery has been successfully created.

5

Searching & Filtering Lists of Deliveries

This section describes how you can search for or filter deliveries.

Inbound Deliveries (by Selected Location)

When you have set a preferred location, the Inbound Deliveries page displays inbound deliveries assigned to your preferred location. You can still select another location to view.

To search and filter inbound deliveries follow the steps below:

1. Select the **Inbound Deliveries** option in the Navigation Menu or in the View Deliveries drop-down menu on the Delivery Metrics page.

Figure 5-1   Inbound Deliveries Page — Preferred Location Selected

2. The inbound deliveries assigned to your selected/preferred location are shown. The table displays the following information:

Column	Description
Status	Displays the status of the delivery. Available status: • Pending • Enroute Pickup • Enroute Dropoff • Pickup Complete • Dropoff Complete • Enroute Return • Returned • Canceled • Error
Delivery ID	The primary reference ID identifying this delivery.
Scheduled Dropoff	The estimated date and time for dropoff of the delivery. **Note:** The Scheduled Dropoff date and time is local to the delivery area and displayed using the dropoff location's local time.
Scheduled Pickup	The date and time at which the delivery is ready for pickup. **Note:** The Scheduled Pickup date and time is local to the delivery area and displayed using the dropoff location's local time.
Pickup Name	The point of contact for a given pickup location.
Pickup Address	The address for a given pickup location.
Schedule	Available schedules: Today, Past, Future

> **Note:**
>
> Select a column heading to sort the table by column in ascending or descending order. If the results cover more than one page, click Next **>** to display the next page of records.

3. Search the inbound deliveries by entering your search criteria or apply a smart filter. The following smart filters are available:

> **Note:**
>
> By default, the Scheduled Today smart filter is applied.

- **Scheduled Today** — This filter displays deliveries for Today in the Schedule column.

- **Scheduled Future** — This filter displays Future Deliveries in the Schedule column.

- **Scheduled Past** — This filter displays Past Deliveries in the Schedule column.

- **Status: Pending** — This filter displays deliveries that have Pending as their current status.

- **Status: Enroute** — This filter displays deliveries that have Enroute Pickup, Enroute Dropfoff, Pickup Complete or Enroute Return as their current status.

- **Status: Complete** — This filter displays deliveries that have Dropoff Complete, Canceled, Error or Returned as their current status.

  When a Smart Filter is applied, the **Smart Filter** button is removed from the page and shown in the Search field. To remove the Smart Filter from the search again, click the x next to the filter and the **Smart Filter** button is displayed again.

> **✏ Note:**
>
> The **Smart Filter** button does not reappear when there are fewer than 10 records (<10). If there are 10 records or more, the **Smart Filter** buttons will appear on the page.

4. The deliveries that match the search or filter criteria are displayed.

When a preferred location has not been set, no deliveries records are displayed on the Inbound Deliveries page.

Figure 5-2   Inbound Deliveries — No Preferred Location

1. Use the Select a Location link to open the Select Location window.

Figure 5-3   Inbound Deliveries — Select Location Window

2. Search for a location or select a location from the dropdown list.

3. Then choose one of the following options:

   • Select **Apply** to set the selected location. The inbound deliveries for the selected location are displayed.

   • Select **Cancel** to return to the Inbound Deliveries page. No deliveries are displayed.

Outbound Deliveries (by Selected Location)

The Outbound Deliveries page displays outbound deliveries assigned to your selected/preferred location.

To search and filter outbound deliveries follow the steps below:

1. From the Ask Oracle navigation menu, select **Outbound Deliveries**, or select the **Outbound Deliveries** option in the View Deliveries drop-down menu on the Delivery Metrics page.

Figure 5-4   Outbound Deliveries Page — Preferred Location Selected

2. The outbound deliveries assigned to your preferred or selected location are displayed. The table displays the following information:

Column	Description
Status	Displays the status of the delivery. Available status: • Pending • Enroute Pickup • Enroute Dropoff • Pickup Complete • Dropoff Complete • Enroute Return • Returned • Canceled • Error
Delivery ID	The primary reference ID identifying this delivery.
Scheduled Pickup	The estimated date and time for pickup of the delivery. **Note:** The Scheduled Pickup date and time is local to the delivery area and displayed using the pickup locations local time.
Scheduled Dropoff	The date and time at which the delivery is ready for dropoff. **Note:** The Scheduled Dropoff date and time is local to the delivery area and displayed using the pickup locations local time.
Dropoff Name	The point of contact for a given dropoff location.
Dropoff Address	The address for a given dropoff location.
Schedule	The schedule for the current delivery. Possible values: Today, Past, Future

> **Note:**
>
> Select a column heading to sort the table by column in ascending or descending order. If the results cover more than one page, click Next **>** to display the next page of records.

3. Search the outbound deliveries by entering your search criteria or apply a smart filter. The following smart filters are available:

> **✏ Note:**
>
> By default, the Scheduled Today smart filter is applied.

- **Scheduled Today** — This filter displays deliveries for Today in the Schedule column.
- **Scheduled Future** — This filter displays Future Deliveries in the Schedule column.
- **Scheduled Past** — This filter displays Past Deliveries in the Schedule column.
- **Status: Pending** — This filter displays deliveries that have Pending as their current status.
- **Status: Enroute** — This filter displays deliveries that have Enroute Pickup, Enroute Dropfoff, Pickup Complete or Enroute Return as their current status.
- **Status: Complete** — This filter displays deliveries that have Dropoff Complete, Canceled, Error or Returned as their current status.

  When a Smart Filter is applied, the **Smart Filter** button is removed from the page and shown in the Search field. To remove the Smart Filter from the search again, click the x next to the filter and the **Smart Filter** button is displayed again.
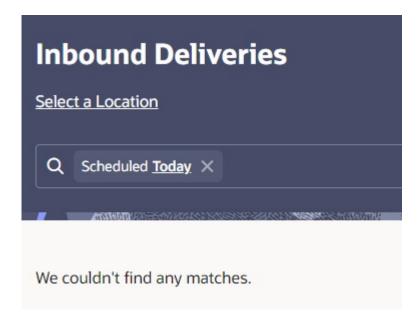
  > **✏ Note:**
  >
  > The **Smart Filter** button will not reappear when there are fewer than 10 records (<10). If there are 10 records or more, the **Smart Filter** buttons will appear on the page.

4. The deliveries that match your search or filter criteria are displayed.

When you have not yet set a preferred location, no deliveries records display on the Inbound Deliveries page.
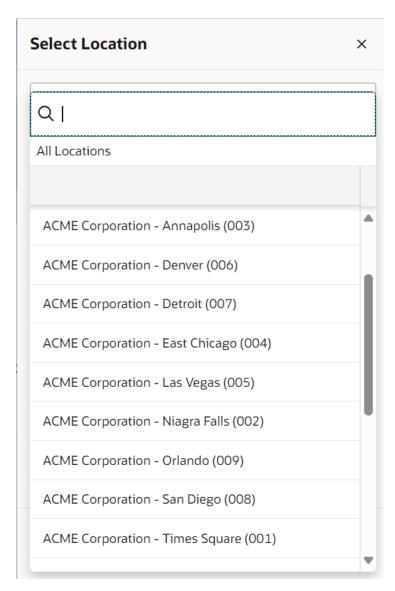
Figure 5-5   Outbound Deliveries — No Preferred Location

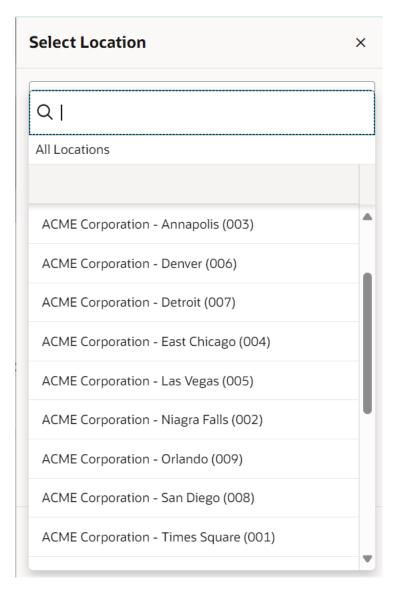1. Use the Select a Location link to open the Select Location window.

Figure 5-6   Outbound Deliveries — Select Location Window
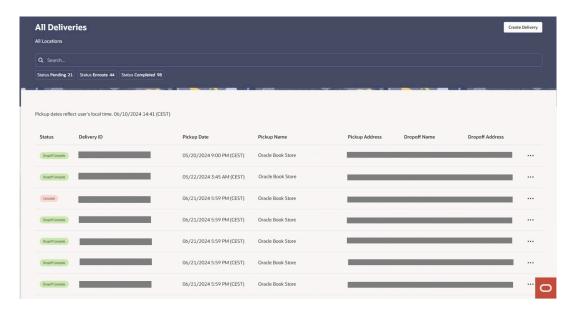
2. Search for a location or select a location from the dropdown list.
3. Then choose one of the following options:
   - Select **Apply** to set the selected location. The outbound deliveries for the selected location are displayed.
   - Select **Cancel** to return to the Outbound Deliveries page. No deliveries are displayed.

All Deliveries (Across all Locations or by Selected Location)

To view and filter all deliveries across all locations or by a selected location, follow the steps below.

1. Select the **All Deliveries** option in the Navigation Menu or in the View Deliveries drop-down menu on the Delivery Metrics page.

Figure 5-7   All Deliveries

2. The deliveries across all locations are displayed. The table displays the following information:

Column	Description
Status	Displays the status of the delivery. Available status: • Pending • Enroute Pickup • Enroute Dropoff • Pickup Complete • Dropoff Complete • Enroute Return • Returned • Canceled • Error
Delivery ID	The primary reference ID identifying this delivery.
Pickup Date	The pickup date and for a location. **Note:** The Pickup Date and time is displayed in the time zone of your local time.
Pickup Name	The point of contact for a given pickup location.
Pickup Address	The address for a given pickup location.
Dropoff Name	The point of contact for a given dropoff location.
Dropoff Address	The address for a given dropoff location.

> **Note:**
>
> Select a column heading to sort the table by column in ascending or descending order. If the results cover more than one page, click Next **>** to display the next page of records.

3. Search the deliveries by entering your search criteria or apply a smart filter. The following smart filters are available:

• **Status: Pending** — This filter displays deliveries that have Pending as their current status.

- **Status: Enroute** — This filter displays deliveries that have Enroute Pickup, Enroute Dropfoff, Pickup Complete or Enroute Return as their current status.

- **Status: Complete** — This filter displays deliveries that have Dropoff Complete, Canceled, Error or Returned as their current status.

  When a Smart Filter is applied, the **Smart Filter** button is removed from the page and shown in the Search field. To remove the Smart Filter from the search again, click the x next to the filter and the **Smart Filter** button is displayed again.
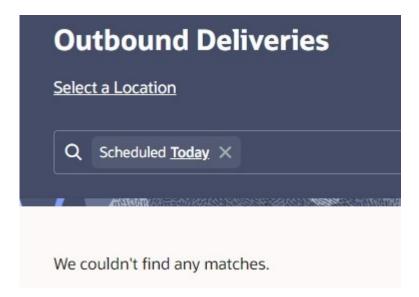
  > **Note:**
  >
  > The **Smart Filter** button will not reappear when there are fewer than 10 records (<10). If there are 10 records or more, the **Smart Filter** buttons will appear on the page.

4. The deliveries that match your search and filter criteria are displayed.

By default all deliveries are displayed. To select a specific location follow the steps below

1. Use the All Locations link to open the Select Location window.
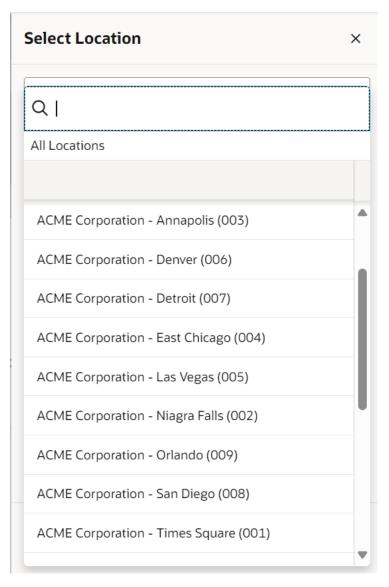
Figure 5-8   All Deliveries — Select Location Window

2. Search for a location or select a location from the dropdown list.

3. Then choose one of the following options:

   • Select **Apply** to set the selected location. The deliveries for the selected location are displayed.

   • Select **Cancel** to return to the All Deliveries page. No deliveries are displayed.

6
Viewing Delivery Details

This section describes how to view the details of a delivery. The option to view the delivery details is available on the Inbound, Outbound and All Deliveries page.

To view the delivery details, follow the steps below:

1. Select a row on the deliveries page.

2. Click the ellipsis. The **View** option appears.

3. Click **View**. The Delivery Details for the selected row appear. The Delivery ID is displayed at the top of the Delivery Details page. The Delivery Details contain the following tabs:

    - Overview
    - Delivery Details
    - Pickup and Dropoff
    - Package Details
    - Status History

> ✎ **Note:**
>
> You can move to the next or back to the previous delivery record in the list page by using the arrow keys above the delivery ID.

Overview

The Overview tab of the Delivery Details contains the following information:

Table 6-1   Delivery Status Section — Overview

Field	Description
Status	Displays the current status of the delivery. The following values are available: • pending • enroute pickup • enroute dropoff • pickup complete • dropoff complete • enroute return • returned • canceled • error
Courier Tracking	Tracking URL from the provider, such as Uber. When clicked, the tracking URL is displayed in a new browser tab.

Table 6-2   About Delivery Section — Overview

Field	Description
Created Date and Time	Displays the date and time when the delivery was created.
Created By	Displays the email address who created the delivery.
Delivery Type	The delivery type of the current delivery.
Package Count	The number of packages of the current delivery.
Value of Items	The value of the current delivery.
Reference Number	The reference number of the delivery.
Tip	The amount of the tip.

Delivery Details

The Delivery Details tab contains the following information:

Table 6-3   Cancel Details Section — Delivery Details

Field	Description
Canceled By	Displays who canceled the current delivery. Possible values are provider, courier, or customer.
Cancel Reason	Displays the cancel reason for the current delivery.
Undeliverable Action	Action for the delivery that could not be delivered.
Undeliverable Reason	The reason the delivery was undeliverable.

> **Note:**
>
> The cancel details section only displays if a delivery is in a canceled, enroute return, or returned status.

Table 6-4   Proof of Delivery Section — Delivery Details

Field	Description
Verification	When the delivery is not in dropoff complete status, the following displays based on what was set when the delivery was created:
	• Contact Required - If the value is yes for contact required.
	• Signature Requested - If the value is yes for signature required.
	• Picture Requested - If the value is yes for picture required.
	• Age Verification Requested - If there is a value for minimumAge.
	When the delivery is in dropoff complete status, the following will display based on the verification the courier completed at dropoff:
	• Signature Captured - If there is a value for dropoff verification.
	• Picture Captured - If there is a value for dropoff verification.
	• Age Verified - If the value is yes for dropoff verification identification verified.

Table 6-4   (Cont.) Proof of Delivery Section — Delivery Details

Field	Description
Undeliverable Preference	Depending on the settings made when the delivery was created, the following is displayed. • Return to Pickup Location • Leave at Door — only applicable to outbound deliveries

Pickup and Dropoff

The Pickup and Dropoff tab contains the following information:

Table 6-5   Pickup Information Section — Pickup and Dropoff

Field	Description
Pickup Date and Time Window	Displays the date and time frame for the current delivery. **Note:** The displayed date and time is local to the pickup or dropoff location.
Pickup Address	Displays the pickup address the current delivery.
Pickup Notes	Displays the pickup notes for the current delivery.

Table 6-6   Dropoff Information Section — Pickup and Dropoff

Field	Description
Dropoff Date and Time Window	Displays the date and time frame for the current delivery. **Note:** The displayed date and time is local to the pickup or dropoff location.
Dropoff Address	Displays the dropoff address for the current delivery.
Dropoff Notes	Displays the notes for the current delivery.

Package Details

The Package Details tab contains the following information for each package of the current delivery:

> **✎ Note:**
>
> You can switch between the imperial and the metric system by selecting the **Imperial** or **Metric** button above the Package section.

Table 6-7   Package Section — Package Details

Field	Description
Package Size	Displays the size description of the package. If unavailable, package dimensions display.
Package Value	Displays the value of the package.

Table 6-7   (Cont.) Package Section — Package Details

Field	Description
Package Link	Contains a link to the label for each package. When clicked, the label opens in a new browser tab.
Contents of Package	Displays what the package contains.

Status History

The Status History tab displays a record of each status the delivery has been in since creation. The most recent status is displayed at the top of the list, determined by the created date and time stamp of each status change. The displayed times are reflected in the time zone local to the pickup or dropoff location.

Cancel Delivery

This section describes how to cancel a delivery. You can cancel a delivery from the Inbound, Outbound and All Deliveries page when the delivery is still pending.
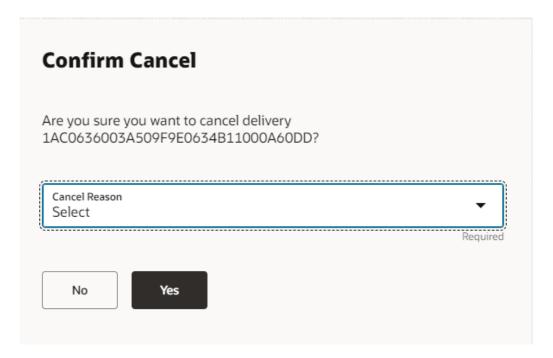
> **Note:**
>
> The option to cancel a delivery is also available in the delivery details tabs when the status is pending. The button is labeled **Cancel Delivery**.

To cancel a delivery, follow the steps below:

1. Select a row on the deliveries page.

2. Click the ellipsis. The **Cancel** option appears.

3. Click **Cancel**. The system validates if the status is still pending.

   - If the status of the delivery is pending, you are prompted to confirm the cancellation.

Figure 6-1   Confirm Cancellation Prompt

–   Select a Cancel Reason from the list and click **Yes** to cancel the selected delivery. A success message is displayed.

> **Note:**
>
> The list of values displayed in the Cancel Reason dropdown menu are the values configured in the Foundation Data - Reason Codes Setup. For more information, see the Configure Reason Codes section.

•   If the status of the delivery is not pending, you receive an error message.

Recreate a Delivery

This section describes how to recreate a delivery. You can recreate a delivery from the Inbound, Outbound and All Deliveries page.

> **Note:**
>
> The option to recreate a delivery is also available in the delivery details tabs. The button is labeled **Recreate Delivery**.

To recreate a delivery, follow the steps below:

1.   Select a row on the deliveries page.

2.   Click the ellipsis. The **Recreate** option appears.

3. Click **Recreate**. The system takes you to the Start Delivery page. The fields contain the values of the delivery you selected. For more information about creating a delivery, see Create a Delivery.
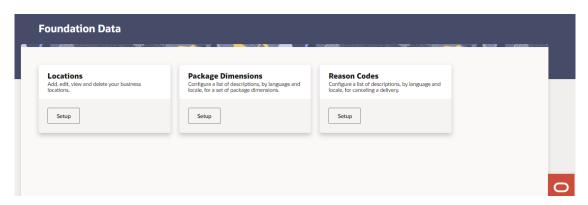
> **Note:**
>
> The process does not copy information that is likely to be unique to each delivery, for example, the amount of the tip or, the scheduling of the delivery.

7

Foundation Data

In Foundation Data page you can manage foundation related data. You can access the page from the Ask Oracle navigation menu, by selecting **Foundation Data**. The Foundation Data page appears.

Figure 7-1   Foundation Data

You can perform the following actions:

- Manage Locations
- Configure Package Dimensions
- Configure Reason Codes

Manage Locations

In the Manage Locations page you can perform the following actions:

- Search for a location(s)
- Add Location
- View Location
- Edit Location
- Delete Location
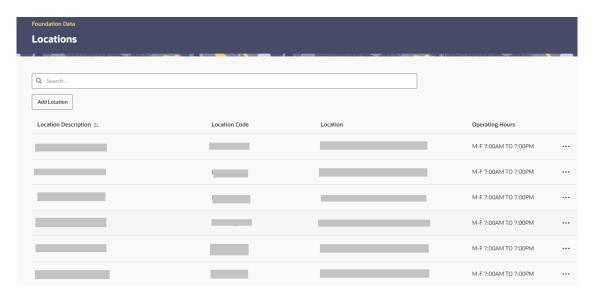
On the Foundation Data page, select **Setup**. The Locations page appears.

The Search field allows you to enter multiple search criteria which filters the results based on matches in the results list.

> **✎ Note:**
>
> Click the column headings to sort the table by column in ascending or descending order. If the results cover more than one page, click Next **>** to display the next page of records.

Figure 7-2   Locations Page

The results list contains the following information and options.

- Location Description
- Location Code
- Location Address
- Operating Hours
- Actions Menu — Displayed as an ellipsis, the Actions Menu allows you to view, edit or delete the selected location.
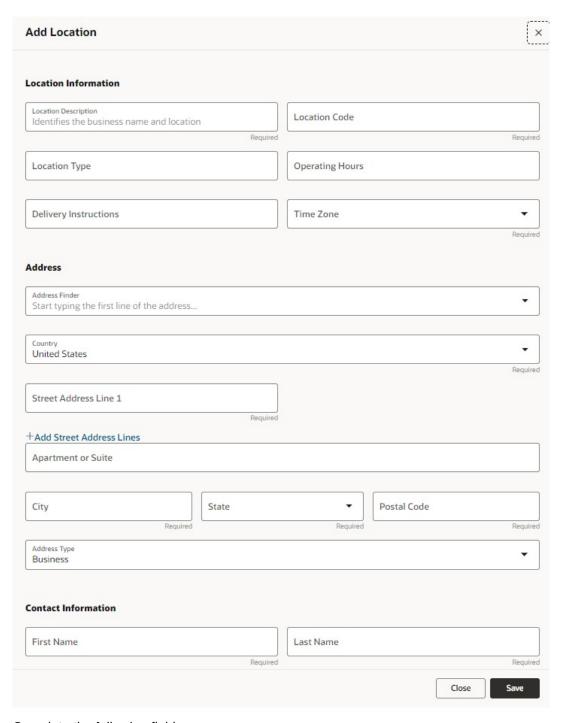
Add Location

This section describes how to add a location for deliveries.

1. On the Locations page, select **Add** Location. The Add Location page appears.

Figure 7-3   Add Location

2.   Complete the following fields.

Table 7-1   Location Information

Field	Description
Location Description	Enter a description of the location to easily identify it. This is a required field. It is recommended to include both the business name and the location name as the description. This will be used when creating Package Labels, so including the business name will be helpful to the courier.
Location Code	Enter a unique code associated to the location that is shared across the business systems. This must be unique for the courier provider.
Location Type	Enter a type or category to classify the location.
Operating Hours	Enter the operating hours of the location.
Delivery Instructions	If necessary, enter delivery instructions for the location.
Time Zone	Select a time zone for your location from the list. This is a required field.

Table 7-2   Address

| Field	Description
Address Finder	Enter the first line of the address.
Country	Select a country for your location from the list. This is a required field.
Street Address Line 1	Enter the address for the location. Street Address Line 1 is a required field.
Add Street Address Lines	Select the Add Street Address Lines link, if you need more than one Street Address Line. You can enter up to four Street Address Lines.
Apartment or Suite	Optional
City	Enter the city of the location. This is a required field.
State	Select or search for a state for the location. This is a required field.
Postal Code	Enter the postal code for the location. This is a required field.
Address Type	Select the Address Type from the list. Available options are Business (default value), Residential or No Distinction. This is a required field.

Table 7-3   Contact Information

Field	Description
First Name	Enter the contact's first name for the location. This is a required field.
Last Name	Enter the contact's last name for the location. This is a required field.
Phone Number	This is a required field.
Email Address	Optional

3. Then select one of the following options.

   - Click **Close** to reject the entries and close the window.

   - Click **Save** to add the new location to the location list.

View Location

This section describes how to view a location.

1. Select a row in the location list. Then select the **View** option in the Actions Menu, displayed as an ellipsis. The View Location page appears.

Figure 7-4   View Location

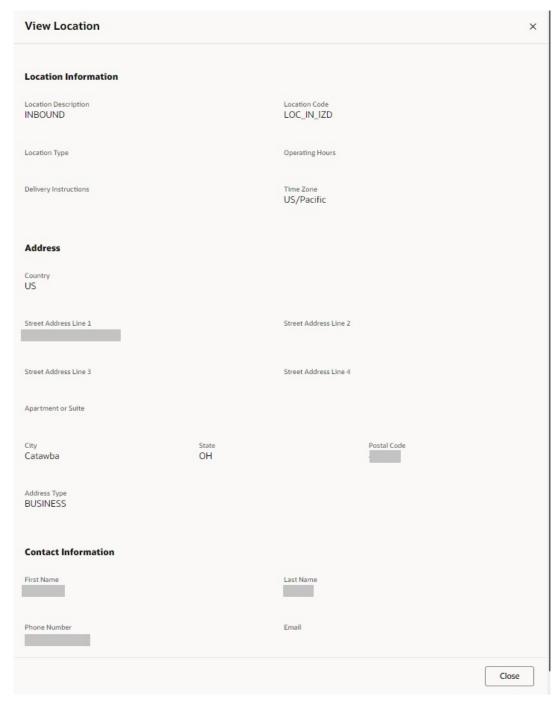2. Click **Close** to close the window.
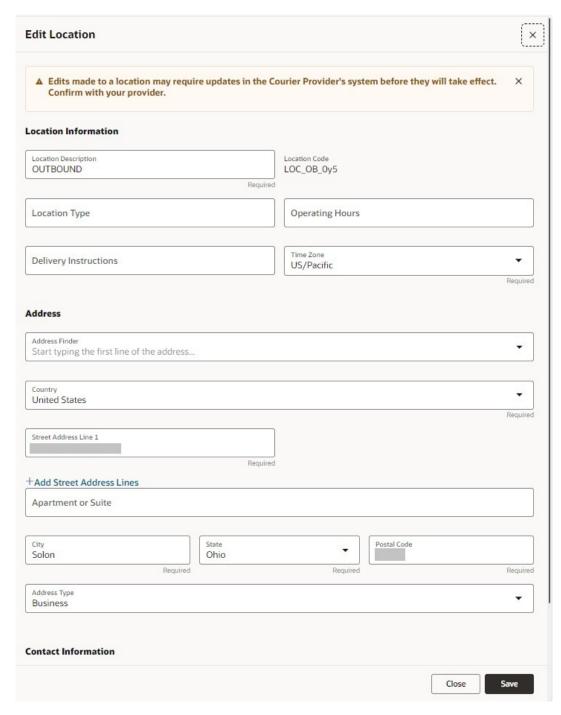
Edit Location

This section describes how to edit a location.

1. Select a row in the location list. Then select the **Edit** option in the Actions Menu, displayed as an ellipsis. The Edit Location page appears.

Figure 7-5   Edit Location

2. Edit the fields as required.

> **Note:**
>
> You cannot edit the Location Code field.

> **Note:**
>
> Edits made to a location may require updates in the Courier Provider's system before they take effect. Confirm with your provider.

3. Then select one of the following options.

   - Click **Close** to reject the entries and close the window.

   - Click **Save** to update the current location.

Delete Location

To delete a location:

1. Select a row in the location list. Then select the **Delete** option in the Actions Menu. You are prompted, if you want to delete the location.

   - Click **Yes** to delete the current location and close the window.

   - Click **No** to keep the location and close the window.

Configure Package Dimensions

In the Configure Package Dimensions page you can perform the following actions:

- Search for a package dimension(s)
- Add Package Dimension
- View Package Dimension
- Edit Package Dimension
- Delete Package Dimension

On the Foundation Data page, select **Setup**. The Package Dimensions page appears.
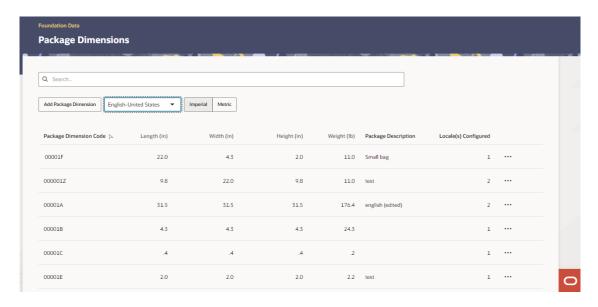
The Search field allows you to enter multiple search criteria which filters the results based on matches in the results list.

> **Note:**
>
> Click the column headings to sort the table by column in ascending or descending order. If the results cover more than one page, click Next **>** to display the next page of records.

Figure 7-6   Package Dimensions Page

The results list contains the following information and options.

- Package Dimension Code
- Length

> **Note:**
>
> You can switch between the imperial and the metric system by selecting the **Imperial** or **Metric** button above the table.

- Width
- Height
- Weight
- Package Description
- Locale(s) Configured

> **Note:**
>
> You can select a locale from the list to see the associated package description, if configured.

- Actions Menu — Displayed as an ellipsis, the Actions Menu allows you to view, edit or delete the selected package dimension.

Add Package Dimension
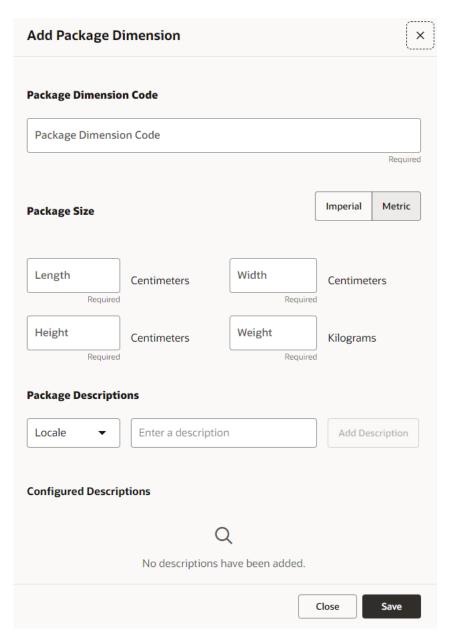
This section describes how to add a package dimension for deliveries.

1. On the Package Dimensions page, select **Add Package Dimension**. The Add Package Dimension page appears.

Figure 7-7   Add Package Dimension

2. Complete the following fields.

Table 7-4   Package Dimension Code

Field	Description
Package Dimension Code	Enter a package Dimension code. The code must be unique. This is a required field.

Table 7-5   Package Size

Field	Description
Imperial Metric button	You can switch between the imperial and the metric system by selecting the **Imperial** or **Metric** button.
	This is a required field.
	The Length, Width, Height are in centimeters when Metric toggle is selected and will be changed to Inches for Imperial. The Weight is in Kilograms for Metric and Pounds in Imperial.
Length	Enter the length of the package.
Height	Enter the Height of the package.
Width	Enter the Width of the package.
Weight	Enter the Weight of the package.

Table 7-6   Package Descriptions

Field	Description
Package Description	You can add a new Package Description in this section: • Select a Locale from the list in the language of the locale selected. • Enter a description in the language of the locale selected. • Select **Add Description**. The new description is displayed in the Configured Descriptions section.
Configured Descriptions	• If you want to update an existing description, use the Update icon next to the configured description. Update your entries in the Package Descriptions section and select **Update Description**. • If you want to delete an existing description, use the Delete icon next to the configured description. You are prompted if you want to delete the description.
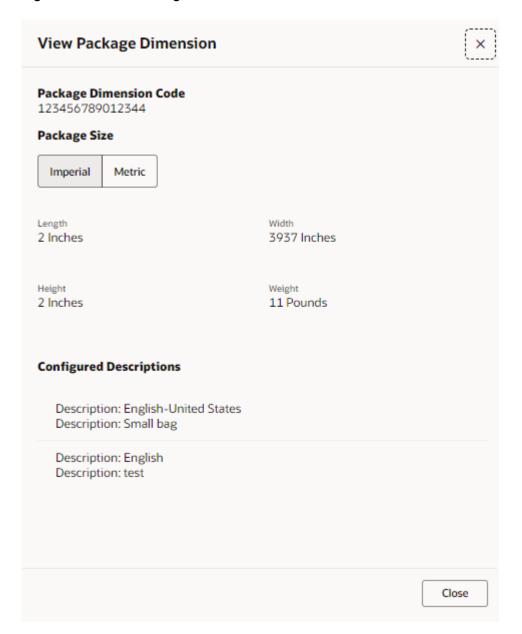
3. Then select one of the following options.

   • Click **Close** to reject the entries and close the window.

   • Click **Save** to add the new package dimension to the package dimension table.

View Package Dimension

This section describes how to view a package dimension.

1. Select a row in the package dimension table. Then select the **View** option in the Actions Menu, displayed as an ellipsis. The View Package Dimension page appears.

Figure 7-8   View Package Dimension

> **Note:**
>
> You can switch between the imperial and the metric system by selecting the **Imperial** or **Metric** button.
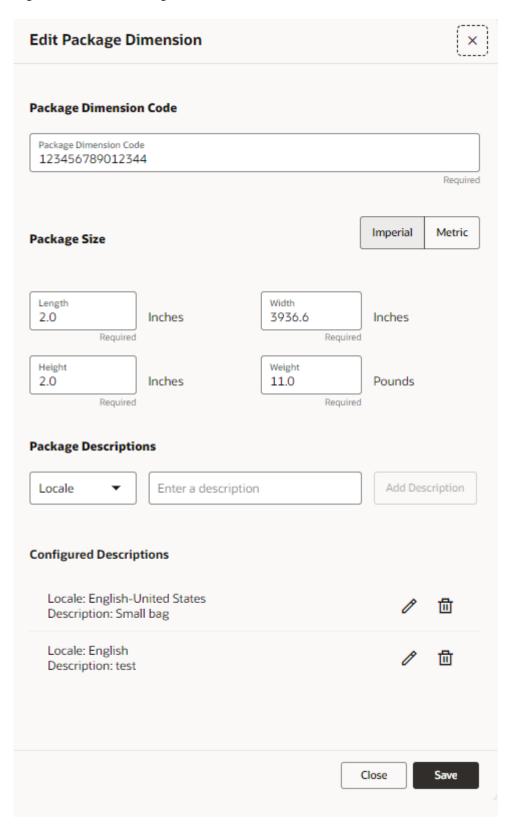
2. Click **Close** to close the window.

Edit Package Dimension

This section describes how to edit a location.

1. Select a row in the package dimension list. Then select the **Edit** option in the Actions Menu, displayed as an ellipsis. The Edit Package Dimension page appears.

Figure 7-9   Edit Package Dimension

2. Edit the fields as required.

> **Note:**
>
> For more information about the fields and sections of the Edit Package Dimension Page, see the Add Package Dimension section.

3. Then select one of the following options.

- Click **Close** to reject the entries and close the window.

- Click **Save** to update the current package dimension.

Delete Package Dimension

To delete a package dimension:

> **Note:**
>
> If you delete a package dimension code, all descriptions configured for this code are deleted, not just the one displayed on the main list page.

1. Select a row in the package dimension list. Then select the **Delete** option in the Actions Menu. You are prompted, if you want to delete the package dimension.

- Click **Yes** to delete the current package dimension and close the window.

- Click **No** to keep the package dimension and close the window.

Configure Reason Codes

In the Configure Reason Codes page you can perform the following actions:

- Search for a reason code(s)
- Add Reason Code
- View Reason Code
- Edit Reason Code
- Delete Reason Code

On the Foundation Data page, select **Setup**. The Reason Codes page appears.
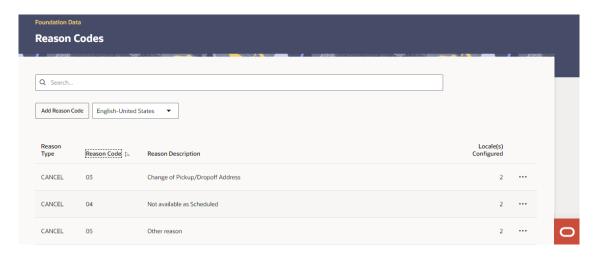
The Search field allows you to enter multiple search criteria which filters the results based on matches in the results list.

> **Note:**
>
> Click the column headings to sort the table by column in ascending or descending order. If the results cover more than one page, click Next **>** to display the next page of records.

Figure 7-10   Reason Codes Page

The results list contains the following information and options.

- Reason Type
- Reason Code
- Reason Description
- Locale(s) Configured

> ✎ **Note:**
>
> You can select a locale from the list to see the associated package description, if configured.
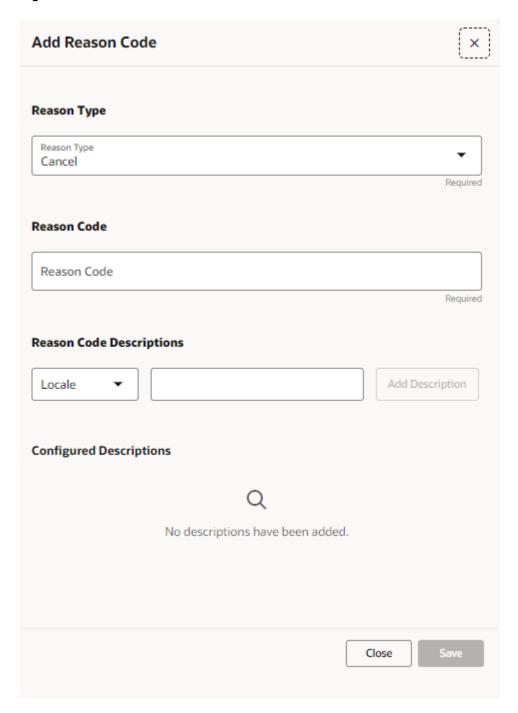
- Actions Menu — Displayed as an ellipsis, the Actions Menu allows you to view, edit or delete the selected reason code.

Add Reason Code

This section describes how to add a reason code for deliveries.

1. On the Reason Code page, select **Add Reason Code**. The Add Reason Code page appears.

Figure 7-11   Add Reason Code

2. Complete the following fields.

Table 7-7   Reason Type

Field Sections	Description
Reason Type	Select a reason type from the list This is a required field.

Table 7-8   Reason Code

Field Sections	Description
Reason Code	Enter the Reason Code. The code must be unique for the reason type. This is a required field.

Table 7-9   Reason Code Descriptions

Field Sections	Description
Reason Description	You can add a new Reason Code Description in this section: • Select a Locale from the list. • Enter a description in the language of the locale selected. • Select **Add Description**. The new description is displayed in the Configured Descriptions section.
Configured Descriptions	• If you want to update an existing description, use the Update icon next to the configured description. Update your entries in the Reason Code Descriptions section and select **Update Description**. • If you want to delete an existing description, use the Delete icon next to the configured description. Your are prompted if you want to delete the description.

3. Then select one of the following options.

   • Click **Close** to reject the entries and close the window.

   • Click **Save** to add the new package dimension to the reason code list.
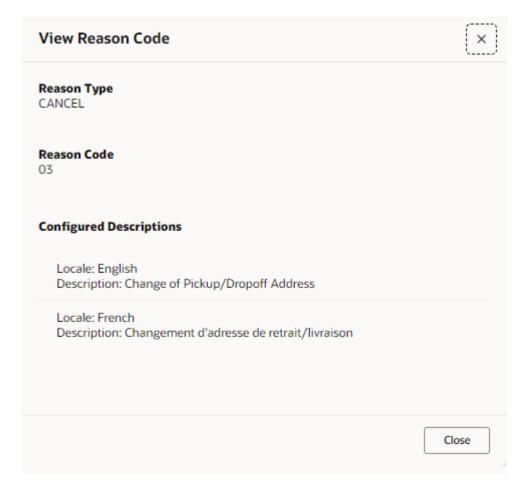
View Reason Code

This section describes how to view a reason code.

1. Select a row in the reason code list. Then select the **View** option in the Actions Menu, displayed as an ellipsis. The View Reason Code page appears.

Figure 7-12   View Reason Code
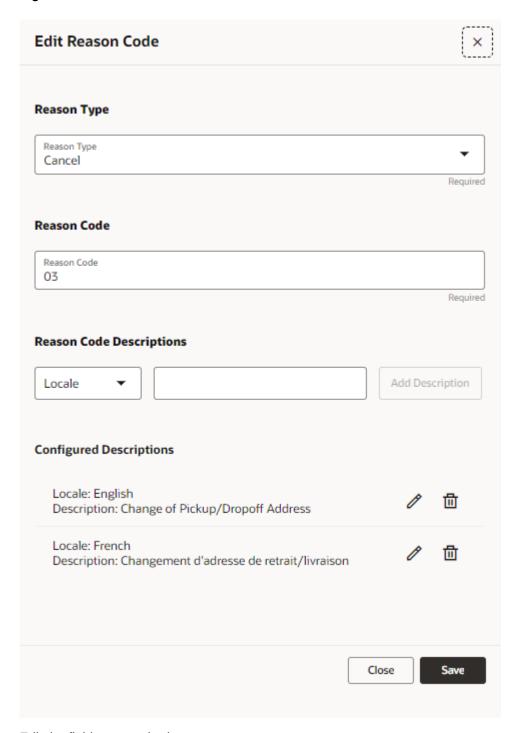
2. Click **Close** to close the window.

Edit Reason Code

This section describes how to edit a reason code.

1. Select a row in the reason code list. Then select the **Edit** option in the Actions Menu, displayed as an ellipsis. The Edit Reason Code page appears.

Figure 7-13   Edit Reason Code

2. Edit the fields as required.

> **Note:**
>
> For more information about the fields and sections of the Edit Reason Code Page, see the Add Reason Code section.

3. Then select one of the following options.

- Click **Close** to reject the entries and close the window.
- Click **Save** to update the current package dimension.

Delete Reason Code

To delete a reason code:

> **Note:**
>
> If you delete a reason code, all descriptions configured for this code are deleted, not just the one displayed on the main list page.

1. Select a row in the reason code list. Then select the **Delete** option in the Actions Menu. You are prompted, if you want to delete the reason code.

   - Click **Yes** to delete the current reason code and close the window.
   - Click **No** to keep the reason code and close the window.

A

Accessibility

Accessibility features built into the Collect and Receive aim to make use of the application easier for persons with disabilities. Users can access the Collect and Receive user interface using only a keyboard or a screen reader such as Freedom Scientific's screen reader, JAWS.

JAWS Usage

Oracle recommends JAWS 2023, March release or later, with the most recent version of Google Chrome for the best user experience.

This section describes how you can interact with the application pages using a screen reader such as JAWS.

- Many pages are logically broken up into different regions. Heading (Hn) tags are used throughout the interface to define page structure. Please use standard screen reader heading navigation to navigate such pages.

- Most items have field-level help defined. To activate field-level help, focus on the item for which you need help and press the keyboard shortcut **ALT+F1**. Pressing this keyboard shortcut displays a popup window containing the help text and, if available, any specific guidelines for accessibility.

- Many built-in features are provided that help a JAWS user deal with validation errors on form pages. For validations that are associated with a particular page item, the actual error message is rendered as a link in the notification section. When a user activates the link, focus shifts to the associated item. This enables all users to easily navigate straight to the page item related to the error.

Keyboard Shortcuts

You can use keyboard shortcuts throughout the Collect and Receive application.

> ✏️ **Note:**
>
> The interface is intended for use with the US keyboard layout.

General Keyboard Shortcuts

Table A-1   General Keyboard Shortcuts

Action	Where	Keys
Display the list of valid keyboard shortcuts for the page	Any page with special keyboard shortcuts	Windows: Alt+Shift+F1 Mac: Option+Shift+F1
Open field help dialog	When focus is on any field with a (?) help icon	Windows: Alt+F1 Mac: Option+F1
Move focus back to field without closing dialog	When focus is on a field help dialog	Windows: Alt+F6 Mac: Option+F6
Close dialog	When focus is on any dialog	Escape
Select the previous/next tab	Any page with focus in region display selector tabs	Arrow keys

Chart Region Keyboard Shortcuts

Table A-2   Chart Region Keyboard Shortcuts

Action	Keys
Move focus to next element	Tab
Move focus to previous element	Shift+Tab
Move focus and selection to previous data item	Up arrow
Move focus and selection to next data item	Down arrow
Move focus and selection to previous data item (on left)	Left arrow
Move focus and selection to next data item (on right)	Right arrow
Move focus and multiselect previous data item	Shift+Up arrow
Move focus and multiselect next data item	Shift+Down arrow
Move focus and multiselect previous data item (on left)	Shift+Left arrow
Move focus and multiselect next data item (on right)	Shift+Right arrow
Move focus to previous data item, without changing the current selection	Ctrl+Up arrow
Move focus to next data item, without changing the current selection	Ctrl+Down arrow
Move focus to previous data item (on left), without changing the current selection	Ctrl+Left arrow
Move focus to next data item (on right), without changing the current selection	Ctrl+Right arrow
Multiselect data item with focus	Ctrl+Space
Zoom in one level if zooming is enabled	= or +
Zoom out one level if zooming is enabled	- or _
Pan up if scrolling is enabled	Page Up
Pan down if scrolling is enabled	Page Down
Pan left in left-to-right locales/Pan right in right-to-left locales	Shift+Page Up
Pan right in left-to-right locales/Pan left in right-to-left locales	Shift+Page Down

Table A-2   (Cont.) Chart Region Keyboard Shortcuts

Action	Keys
Drill on data item, categorical axis label, or legend item when drilling is enabled	Enter

Date Picker Keyboard Shortcuts

Table A-3   Date Picker Keyboard Shortcuts

Action	Keys
Open the popup, when the input has focus and Display Mode is set to popup	Down arrow
Close the popup and focus the input, when Display Mode is set to popup	Escape
Focus the next element	Tab • Note: When the **Display Mode** is set to popup and the last element is focused, pressing Tab moves focus to the first element
Focus the previous element	Shift+Tab • Note: When the **Display Mode** is set to popup and the first element is focused, pressing Tab moves focus to the last element
Move focus to the same day of the previous week	Up arrow
Move focus to the same day of the next week	Down arrow
Move focus to the previous day	Left arrow
Move focus to the next day	Right arrow
Move focus to the first day of the current week	Home
Move focus to the last day of the current week	End
Change the grid of dates to the previous month	Page Up
Change the grid of dates to the next month	Page Down
Change the grid of dates to the previous year	Shift+Page Up
Change the grid of dates to the next year	Shift+Page Down
Select the focused date, when Show Time is off	Enter or Space
Select the focused date, when Show Time is on	Enter or Space, then Done

Map Keyboard Shortcuts

Table A-4   Map Keyboard Shortcuts

Action	Keys
Increase the zoom level by 1	= / +
Increase the zoom level by 2	Shift-= / Shift-+
Decrease the zoom level by 1	-
Pan by 100 pixels	Arrow keys
Increase the rotation by 15 degrees	Shift+Right arrow
Decrease the rotation by 15 degrees	Shift+Left arrow
Increase the pitch by 10 degrees	Shift+Up arrow
Decrease the pitch by 10 degrees	Shift+Down arrow

Select One Keyboard Shortcuts

Table A-5   Select One Keyboard Shortcuts

Action	Keys
Open dropdown to show suggestions	Down arrow
Navigate down suggestions in open dropdown	Down arrow
Navigate up suggestions in open dropdown	Up arrow
Close dropdown	Escape
Select current suggestion and move focus to the next item	Tab
Select current suggestion and close the dropdown	Enter

Template Component Reports Keyboard Shortcuts

Table A-6   Template Component Reports Keyboard Shortcuts

Action	Keys
Move focus or selection to the previous item	Up arrow or Left arrow
Move focus or selection to the next item	Down arrow or Right arrow
Move focus or selection to the first item	Home
Move focus or selection to the last item	End
Select the focused item, when multiple selection is enabled	Space
Select all items, when multiple selection is enabled	Ctrl+A
Extend the selection to include the new item, when multiple selection is enabled	Shift with Arrow keys
Move focus without changing the selection, when multiple selection is enabled	Ctrl with Arrow keys

Table A-6   (Cont.) Template Component Reports Keyboard Shortcuts

Action	Keys
Toggle selection for the current item, when multiple selection is enabled	Ctrl+Space