

# Oracle<sup>®</sup> Retail Order Orchestration Cloud Service

## Order Orchestration Store Connect Online Help



Release 24.1.101.0

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The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

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Oracle Retail Order Orchestration Cloud Service Order Orchestration Store Connect Online Help, Release 24.1.101.0

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# Contents

|    |                        |       |
|----|------------------------|-------|
| 1  | Store Connect Overview |       |
| 2  | New Orders             |       |
| 3  | Search Options         |       |
| 4  | View Order             |       |
| 5  | Pick List Pull Sheet   |       |
| 6  | Ready to Pick          |       |
| 7  | Pick Order             |       |
| 8  | Ready to Receive       |       |
| 9  | Receive Order          |       |
| 10 | Ready to Ship          |       |
| 11 | Ship Order             |       |
|    | Edit Ship To Details   | 11-10 |

12 Ready to Pick Up

---

13 Pick Up Order

---

14 All Orders

---

15 View Full Order

---

16 Order History

---

17 Pack Slip

---

18 Cancel Order

---

19 Cancel Item

---

20 Reject Order

---

21 Reject Item

---

22 Change Order Pick Up Date

---

23 About Store Connect

---

24 Tasks

---

25 Glossary

---

26 Frequently Asked Questions

---

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# Preface

The Order Orchestration System Cloud Service Store Connect online help describes the screens a store associate uses to work with assigned orders.

## **Audience**

This document is intended for store associates who use Store Connect.

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- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

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Oracle Retail Insights Cloud Service is hosted in the Oracle Cloud with the security features inherent to Oracle technology and a robust data center classification, providing significant uptime. The Oracle Cloud team is responsible for installing, monitoring, patching, and upgrading retail software.

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Included in the service is continuous technical support, access to software feature enhancements, hardware upgrades, and disaster recovery. The Cloud Service model helps to free customer IT resources from the need to perform these tasks, giving retailers greater business agility to respond to changing technologies and to perform more value-added tasks focused on business processes and innovation.

Oracle Retail Software Cloud Service is acquired exclusively through a subscription service (SaaS) model. This shifts funding from a capital investment in software to an operational expense. Subscription-based pricing for retail applications offers flexibility and cost effectiveness.

# 1

## Store Connect Overview

**Purpose:** Use Store Connect to accept, pick, and confirm fulfillment for orders that Oracle Retail *Order Orchestration* has assigned to your store location. Order types you can fulfill through Store Connect are:

- **Delivery orders:** The order needs to be shipped to the customer.
- **Pickup orders:** The customer comes to the store to pick up the order.
- **Ship-for-pickup orders:** The customer comes to the store to pick up the order, but the merchandise can be shipped to the selected pickup location from another location. The processing steps differ depending on whether the items on the order are sourced at a different location (the *sourcing location*) or the items are available in the same location where the customer picks them up.

Your system administrator determines whether your current store location can fulfill delivery orders, pickup orders, ship-for-pickup orders, or all order types.

**Logging into Store Connect:** If you are assigned to more than one store location, then you need to select the store location where you are currently working when you log into Store Connect. If you need to change store locations after logging in (for example, if you logged into store A and you meant to log into store B), you need to log out of Store Connect and then log back in.

Note that you should not have Store Connect open in more than one browser tab.

### Processing Pickup Orders

**Pickup order processing steps:** The steps in processing a pickup order are described briefly below. Note that, with the exception of the *All Orders* screen and the *View Full Order* screen, the screens mentioned below display orders and items only if they are assigned to your current store location and eligible for the related processing step, such as accepting the order.

1. **Accept order:** When you first log into Store Connect, you see the *New Orders* screen. You can accept one or more pickup orders for processing from this screen. You can also accept an individual new order at the *View Order* screen.

Depending on the configuration for your organization and your store location, a *Pick List Pull Sheet* may be generated for you to use when picking one or more orders.

2. **Pick order:** You can pick the items for an accepted pickup order by selecting it at the *Ready to Pick* screen and advancing to the *Pick Order* screen. The option to pick an order is also available at the *View Order* screen, if the order has been accepted, as well as the *View Full Order* screen, if the order is assigned to your current location. A pickup notification email is sent to the customer when you pick a pickup order.
3. **Confirming pickup:** You can confirm pickup for a pickup order by selecting the order at the *Ready to Pick Up* screen and advancing to the *Pick Up Order* screen.

Depending on the configuration for your organization, you can perform a partial pickup if, for example, the customer is prepared to pick up one item on the order but would like to return tomorrow for another, larger item.



**After pickup:** When you confirm that the customer has picked up a pickup order, the order is no longer displayed on the processing screens in Store Connect, although you can still review it through the [All Orders](#) screen.

**Packing slip:** At any of the above steps, the [Packing Slip](#) may be generated automatically, based on the configuration for your organization. You can also generate the Packing Slip on demand, after the order is accepted and is still open, by selecting

**View Packing Documents** from More Options (  ) at the bottom right of the screen.

## Processing Delivery Orders

**Delivery order processing steps:** The steps in processing a delivery order are described briefly below. Note that, with the exception of the [All Orders](#) screen and the [View Full Order](#) screen, the screens mentioned below display orders and items only if they are assigned to your current store location and eligible for the related processing step, such as accepting an order.

1. **Accept order:** When you first log into Store Connect, you see the [New Orders](#) screen. You can accept one or more delivery orders for processing from this screen. You can also accept an individual new order at the [View Order](#) screen.

Depending on the configuration for your organization and your store location, a [Pick List Pull Sheet](#) may be generated for you to use when picking one or more orders.


2. **Pick order:** You can pick the items for an accepted delivery order by selecting it at the [Ready to Pick](#) screen and advancing to the [Pick Order](#) screen. The option to pick an order is also available at the [View Order](#) screen, if the order has been accepted.
3. **Shipping the order:** You can ship a picked delivery order by selecting the order at the [Ready to Ship](#) screen and advancing to the [Ship Order](#) (or [Ship Order Manually](#)) screen. Depending on the configuration for your organization and your store location, you can use either normal shipping, which uses an integration with a shipping service that typically assigned a tracking number and generates a carrier-compliant label, or manual shipping.

Depending on the configuration for your organization, you can perform a partial shipment if, for example, an item on the order is not currently available, or an item that you already picked is damaged. The barcode shipping label can also be generated at shipment if configured for your organization and if you are using normal shipping.

The weight, box size, and carrier are all required for normal shipping; for manual shipping, you can enter the tracking number.

**After fulfillment:** When you ship a delivery order, the order is no longer displayed on the processing screens in Store Connect, although you can still review it through the [All Orders](#) screen. When a delivery order is fully or partially shipped, the customer receives a shipment confirmation email.

**Packing slip:** At any of the above steps, the [Packing Slip](#) may be generated automatically, based on the configuration for your organization. You can also generate the Packing Slip on demand, after the order is accepted and is still open, by selecting

**View Packing Documents** from More Options (  ) at the bottom right of the screen.

## Processing Ship-for-Pickup Orders

The steps in processing a ship-for-pickup order are described briefly below. As noted above for delivery and pickup orders, with the exception of the [All Orders](#) screen and the [View Full Order](#) screen, the screens mentioned below display orders and items only if they are assigned to your current store location and are eligible for the related processing step, such as accepting or picking the order.

**Ship-for-pickup order processing steps:** A ship-for-pickup order differs from a pickup order in that the items for the order can be sourced by a different location. For example:

- *If the sourcing location differs from pickup location:* A customer places an order and wants to pick up item A from store 1. Store 1 supports pickup of orders, but doesn't have item A in stock.
  - Order Orchestration selects store 2 to source the order. If you work in store 2, when you log in, you see the order on the [New Orders](#) screen.
  - In store 2, you accept the order and pick it, as described above for delivery and pickup orders.
  - You then ship the order to store 1, as described above for delivery orders, except that the shipping address is the pickup store.
  - In store 1, the order is now listed at the [Ready to Receive](#) screen. Its status indicates that it's in transit.
  - When the order arrives in store 1, a store associate finds the order at the [Ready to Receive](#) screen, and then uses the [Receive Order](#) screen to confirm receipt.
  - The order is then listed on the [Ready to Pick Up](#) screen, and a pickup notification email is sent to the customer.
  - You use the [Pick Up Order](#) screen to confirm pickup when the customer arrives to pick up the order.
- *If the sourcing location is the same as the pickup location:* A customer places an order and wants to pick up item B from store 1, which has the item in stock. Order Orchestration selects store 1 to source the order. Because the sourcing and pickup location are the same, the shipment and receipt steps aren't necessary.
  - If you work in store 1, when you log in, you see the order on the [New Orders](#) screen.
  - You accept the order and pick it, as described above.
  - The order is then listed on the [Ready to Pick Up](#) screen, and a pickup notification email is sent to the customer.
  - You use the [Pick Up Order](#) screen to confirm pickup when the customer arrives to pick up the order.

See above for more information on generating packing documents.

## Canceling or Rejecting an Order or Item

**Canceling an order or item:** You can cancel an order if the customer does not want to receive it. Order Orchestration does not attempt to find another location for the order. You need to specify the reason for the cancellation.

If your organization supports it, you can cancel individual items on an order, or a partial quantity of an item. Otherwise, you need to cancel the entire order.

You can't cancel an item on a ship-for-pickup order when it's in transit to your store location for pickup. Once you receive the item, you can cancel it.

**Rejecting an order or item:** You can reject an order if the items are not available at your current store location. If it's a delivery order, or if the sourcing location for a ship-for-pickup order rejects the order, Order Orchestration attempts to find another location to ship the items to the customer or to the pickup location. If it's a pickup order, the order is not reassigned.

If your organization supports it, you can reject individual items on an order, or a partial quantity of an item. Otherwise, you need to reject the entire order.

### Printing Documents

Depending on the configuration for your organization and store location, Store Connect generates the following documents. You can print them using the standard print options in your browser.

- *Pick List Pull Sheet:* Designed to help you pick the items for new orders when you accept them.
- *Packing Slip:* Can be included in the carton for shipment of a delivery or ship-for-pickup order, or with the items at pickup of a pickup or ship-for-pickup order.
- *Barcode shipping label:* Can be attached to the carton for shipment of a delivery or ship-for-pickup order. Generated only when you use normal shipping and if configured for your organization.

### If the Order is Under Review

When an order is flagged as under review, it is not eligible to be picked up, shipped to the customer, or shipped to the pickup location; however, you can still accept, pick, or receive an order that is under review.

### Email Summary

Store Connect generates the following types of emails to the customer, if configured for your organization:

- *pickup ready notification:* Generated when items on a pickup order are picked, or when items on a ship-for-pickup order are picked (if the sourcing location is the same as the pickup location) or received (if the sourcing location ships the items to the pickup location), as described above, if your organization supports it.
- *pickup ready reminder:* Generated if your organization supports it, based on whether the items on a pickup or ship-for-pickup order have been ready for pickup for longer than the number of hours defined when the emails are generated for your organization. These emails might be scheduled to go out every day, or at some other interval, until the customer picks up the order.
- *shipment confirmation:* Generated when a delivery order is shipped. Includes the tracking number, and indicates which items are included in the shipment.

Also, Order Orchestration generates a notification email to the email address specified for your location when any orders are assigned to your location, if configured for your organization.

## Session Timeout







If your Store Connect session is inactive for an amount of time defined by your system administrator, you see a warning window indicating when the session will time out. If your session remains inactive and your session times out, you can log back in, and will need to select your current store location again.

Note that you should not have multiple Store Connect sessions open at the same time in different browser tabs.

If you have another session for a related application, such as Order Orchestration, when you log out or are timed out of one application in the same browser, you are logged out of all related applications. Then if you log back into one application, you can also log back into the others by reloading the page for each.

## Screen Icons

You can use the following screen icons:

- *New Orders*: 
- *Ready to Pick*: 
- *Ready to Ship*: 
- *Ready to Receive*: 
- *Ready to Pick Up*: 
- *All Orders*: 

# 2

## New Orders

**Purpose:** Use this screen to review or search for new orders that have been assigned to your current store location but not yet been accepted for processing. You can then accept one or more orders for processing, or reject or cancel orders.

**How to display this screen:** This is the first screen that opens when you log into Store Connect. You can also advance to this screen by selecting **New Orders** from the Tasks list, or by selecting the New Orders icon (✱).

**Which orders are displayed?** This screen displays all new pickup, delivery, or ship-for-pickup orders that are assigned to your current store location and have not yet begun processing. If there are more than 100 new orders, the oldest 100 orders are displayed, and a message indicates that there are additional orders. You can use the [Search Options](#) to restrict the displayed orders.



### Note:

**When are ship-for-pickup orders listed?** Ship-for-pickup orders are listed only if they are assigned to your current location for sourcing, regardless of whether the customer wants to pick up the ship-for-pickup order at your current location, or you need to ship the order to a different location for pickup. Ship-for-pickup orders that are sourced at a different location and then shipped to your current location are not listed at this screen; you use the [Ready to Receive](#) screen to view and select these orders.

If you advance to a different screen and then return to this screen, the list of new orders is refreshed: any new orders are added, and orders that have begun processing, been rejected, or been canceled are removed.

**Accepting orders:** Your options for accepting orders at the New Orders screen include:

- **Accept an order:** To accept a single order without reviewing it, highlight the order in the New Order list and select **Accept**.
- **Review an order before accepting:** You can also highlight an order and select **View** to advance to the [View Order](#) screen and optionally accept it from that screen. You might use this option if you need to review the individual items on the order, and possibly cancel or reject any of the items.
- **Accept multiple orders:** To accept multiple orders, highlight each order in the New Order list and select **Accept**.



### Note:

Even after you accept an order, you can reject it afterward if needed.


**Error message?** A message indicates if the status of one or more of the selected orders has changed since the screen displayed the list of orders.

**After you accept:** When you accept one or more orders, a window confirms the total number of orders accepted, and provides a link to view any printed documents. The settings in Order Orchestration control whether Store Connect generates the [Pick List Pull Sheet](#) and/or the [Packing Slip](#) when you accept an order. See those documents for more information.

**Under Review?** You can accept and pick an order that is flagged as [Under Review](#); however, you can't ship the order or pick it up until the order is no longer under review.

**Next steps:** The next step in the order fulfillment process is to pick the order. See the [Ready to Pick](#) screen for more information.

#### Fields at this screen:

- [Order ID](#), preceded by the express icon (  ) for a delivery or ship-for-pickup order if the carrier assigned to the order is flagged as an express shipper, and followed by an indicator if the order is [Under Review](#)
- [Date and Time](#), with a red triangle indicating if the order hasn't been processed within the number of hours defined by your system administrator
- [Customer and Pickup](#)
- [Request ID](#)

#### Note:

The date and request ID are listed together when you are using a tablet. The date and time, order ID, customer and pickup, and request ID are listed under [Date and Details](#) when you are using a small screen, such as a mobile device or phone.




- [Fulfillment Type](#)
- [Lines](#)




#### Note:

**Additional existing items for displayed orders?** If your organization supports it, the displayed orders might have additional order lines that are not new for your current location. For example, if items on a delivery order are assigned to two different locations for fulfillment, the number of order lines indicated here includes only order lines that have been assigned to your current store location. Also, if any lines on the order have already been accepted at your current location, these lines are not included in the total number of order lines indicated.

**More information:** See [Store Connect Overview](#) for background on processing orders in Store Connect.

#### Options at this screen:

| Option   | Procedure   |
|--|---|
| <b>Search for an order, or limit the results to certain orders</b>                     | Use the <a href="#">Search Options</a> , available by clicking the magnifying glass icon (  ) or putting the cursor in the <i>Search Criteria</i> field.   |
| <b>Accept one or more orders to begin processing</b>                                   | <p>Select one or more orders and click <b>Accept</b>.</p> <p>A message indicates if the status of one or more of the selected orders has changed since the screen displayed the list of orders.</p> <p><b>After you accept:</b> When you accept one or more orders, a window confirms the total number of orders accepted, and provides a link to view any printed documents. The settings in <a href="#">Order Orchestration</a> control whether Store Connect generates the <a href="#">Pick List Pull Sheet</a> and/or the <a href="#">Packing Slip</a> when you accept an order. See those documents for more information.</p> <p><b>Error message?</b> A message indicates if the status of the order selected for processing has changed since the screen displayed the list of orders.</p> |
| <b>Select an order to view it and optionally update it (accept, reject, or cancel)</b> | Select an order and click <b>View</b> to advance to the <a href="#">View Order</a> screen.  |
| <b>Select an order to view order history</b>   | Select an order and select <b>View Order History</b> from <i>More Options</i> (  ) to advance to the <a href="#">Order History</a> screen.   |
| <b>Cancel an order</b>   | <p><b>Cancel order?</b> You might cancel an order if the customer has indicated that they don't want the order. Order Orchestration doesn't attempt to find another location for the order.</p> <p><b>How to cancel:</b> Select an order and select <b>Cancel Order</b> from <i>More Options</i> (  ). See the <a href="#">Cancel Order</a> window for more information.</p> <p>A message indicates if the status of the order has changed since the screen displayed the list of orders.</p>  |

| Option                  | Procedure   |
|-------------------------|---|
| <b>Reject an order</b>  | <p><b>Reject order?</b> You might reject an order if you don't have the stock available to fulfill it.</p> <p><b>What happens when you reject:</b></p> <ul style="list-style-type: none"> <li>• When you reject a delivery order, or a ship-for-pickup order that your current location is assigned to ship to the pickup location, Order Orchestration sees if there is another location that can fulfill or source the order.</li> <li>• When you reject a pickup order, the customer is notified that the order is not available for pickup and the order status is set to unfulfillable.</li> <li>• When you reject a ship-for-pickup order that is to be sourced at your current location and that the customer wants to pick up from your current location, Order Orchestration sees if there is another location that can source the order. If the order can't be sourced from another location, the customer is notified that the order is not available for pickup and the order status is set to unfulfillable.</li> </ul> <p><b>How to reject:</b> Select an order and select <b>Reject Order</b> from <i>More Options</i> (). See the <a href="#">Reject Order</a> window for more information.</p> <p>A message indicates if the status of the order has changed since the screen displayed the list of orders.</p> |
| <b>Additional tasks</b> | <p>Select the <i>Tasks</i> icon () to open a drawer on the left that displays a list of options. See <a href="#">Tasks</a>.</p> <p>These options are also available by opening the <i>Menu</i> option ().</p>  |



# 3

## Search Options

Use the Search options to restrict the orders displayed at the *New Orders*, *Ready to Pick*, *Ready to Receive*, *Ready to Ship*, *Ready to Pick Up*, or *All Orders* screens.

**How to display the Search options:** Click the magnifying glass icon in the *Search Criteria* field at the top of the screen. The Search options drawer open to the right of the screen.

### All Orders



**Selecting one or more search criteria:** Enter one or more of the search criteria described below and select **Apply** to search. Otherwise, select **Clear** to clear the entered search criteria, or **Cancel** to exit the Search options.

| Field               | Description   |
|---------------------|---|
| <b>Order Number</b> | Optionally, enter a full or partial order number to restrict the results to orders that start with or match your entry. This is the code assigned to identify the order in the originating system. For example, an entry of 123 matches order numbers of 12345 or 123ABC. Also, searching is not case-sensitive: a search for abc matches an order number that includes ABC.<br><b>Note:</b> Two orders can be assigned the same order ID if, for example, the customer added a new item to an existing order in the system where the order was placed.   |
| <b>Last Name</b>    | Optionally, enter a full or partial last name to restrict the results to orders placed by customers whose last names start with or match your entry. For example, an entry of John matches customers whose last names are John or Johnson. Not case-sensitive: an entry of john or JOHN matches John or Johnson.  |
| <b>Date From</b>    | Optionally, enter or select the earliest order date to include in the search results. Based on the date and time when the order was created in Order Orchestration, which might be different from the date when the order was created in the originating system.<br>If you enter a <i>Date From</i> but not a <i>Date To</i> , the search results include orders with dates from the <i>Date From</i> to the current date.<br>Your entry must be a valid date format for your organization. If you enter a 4-digit number in a date field, your entry is interpreted as the year, and the current day and month are filled in. For example, if you enter 2022 and the current date is April 1, the date is filled in as 4/1/2022, depending on the date format for your locale. |

| Field                          | Description   |
|--------------------------------|---|
| <b>Date To</b>                 | <p>Optionally, enter or select the latest order date to include in the search results. Based on the date and time when the order was created in Order Orchestration, which might be different from the date when the order was created in the originating system.</p> <p>If you enter a <i>Date To</i> but not a <i>Date From</i>, the search results include orders with any dates up until the <i>Date To</i>.</p> <p>Your entry must be a valid date format for your organization. If you enter a 4-digit number in a date field, your entry is interpreted as the year, and the current day and month are filled in. For example, if you enter 2022 and the current date is April 1, the date is filled in as 4/1/2022, depending on the date format for your locale.</p> |
| <b>Phone Number</b>            | <p>Optionally, enter a full or partial phone number, excluding any formatting (such as parentheses or hyphens), and select either <b>Day</b> or <b>Evening</b> to display orders where the customers who placed the orders have a phone number of the selected type that starts with your entry or matches it exactly. For example, an entry of 555 matches daytime phone numbers that start with area code 555.</p> <p>Your entry doesn't need to include any additional formatting or punctuation. If your entry includes any non-numeric characters, they are ignored for searching.</p>   |
| <b>Fulfillment Type</b>        | <p>Optionally, select a fulfillment type of <b>Delivery</b>, <b>Pickup</b>, or <b>Ship for Pickup</b>, indicating if the order should ship to the customer, if the customer will come to the store to pick it up, or that the customer will come to a store to pick it up, but the merchandise might need to be sourced from a different store location. See the <a href="#">Store Connect Overview</a> for background.</p> <p>Note that the option to search based on fulfillment type is always displayed, even on screens that support only a single fulfillment type. For example, the option to search based on fulfillment type is available at the Ready to Receive screen, which displays only ship-for-pickup orders.</p>  |
| <b>Express Deliveries Only</b> | <p>Optionally, select Express Deliveries Only to display orders only if they use a carrier flagged for express delivery.</p> <p>This option applies only to delivery orders or ship-for-pickup orders, although the option is always displayed.</p>   |
| <b>Request ID</b>              | <p>Optionally, enter a valid request ID to display the order assigned to that ID. Must be an exact match.</p>   |
| <b>Originating Location</b>    | <p>Identifies the location where the order was placed. This might be a store location, or the distribution center if, for example, the order originated through the web storefront. Displayed only from the <a href="#">All Orders</a> screen.</p> <p>Optionally, select a location from the list, or enter a full or partial location name to filter the displayed locations to those that start with or match your entry, and then select a location from the filtered list.</p>  |

---

| Field                      | Description  |
|----------------------------|--|
| <b>Fulfilling Location</b> | <p>Identifies the location:</p> <ul style="list-style-type: none"><li>• That ships the order (delivery)</li><li>• That sources the order (ship-for-pickup)</li><li>• Where the customer picks up the order (pickup)</li></ul> <p>Displayed only from the <i>All Orders</i> screen.</p> <p>Optionally, select a location from the list, or enter a full or partial location name to filter the displayed locations to those that start with or match your entry, and then select a location from the filtered list. Searching for <b>unfulfill</b> shows orders that could not be fulfilled, if <b>Unfulfillable</b> is the name of the default unfulfillable location for your organization.</p> <p>If a delivery order is fulfilled out of more than one location, or a ship-for-pickup order is sourced out of more than one location, the search results display orders that include at least one item assigned to the specified fulfilling location.</p> <p>If a ship-for-pickup order is sourced from a different location than the pickup location, you need to select the sourcing location, not the pickup location, in order to find the order in the search results.</p> |

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# 4

## View Order

**Purpose:** Use this screen to view or update items on an order that are currently assigned to your current store location for shipment, sourcing, or pickup, and optionally to perform the next processing step for the order, such as picking the order.




**Which order lines are displayed?** The View Order screen displays order lines only if they're eligible, at your current store location, for the processing step related to the screen where you selected the *View* option. For example, if you click *View* at the New Orders screen, only order lines that haven't yet been accepted at your current store location are displayed. If you click *View* at the Ready to Pick screen, only order lines that have been accepted at your current location, but not yet picked, are displayed.




**Available when?** This screen is available by selecting **View** in the bottom right at the following screens:

- **New Orders:** If there are any order lines that haven't yet been accepted.
- **Ready to Pick:** If there are any order lines that have been accepted, but haven't yet been picked.
- **Ready to Receive:** If there are any order lines on a ship-for-pickup order that have been shipped from the sourcing location, but haven't yet been received at your current location.
- **Ready to Ship:** If there are any order lines on a delivery order that have been picked but not yet been shipped to the customer, or on a ship-for-pickup order that have been picked but not yet been shipped to the pickup location.
- **Ready to Pick Up:** If there are any order lines on a pickup order that have been picked but not yet picked up by the customer, or on a ship-for-pickup order that have been received at your current store location but not yet picked up by the customer; also, if a ship-for-pickup doesn't have a separate sourcing location, but instead the order lines were picked at your current store location.

If all the items on an order are assigned to a different store location, aren't open, or aren't in one of the statuses described above, you can review the order at the [View Full Order](#) screen, which is available from the [All Orders](#) screen. Also, you need to use the View Full Order screen to view all lines on an order, regardless of status.

### Options at this screen


| Option   | Procedure   |
|--|---|
| <b>perform the next step in processing the order</b> | <p>Depending on the order's current status, the next processing step is:</p> <ul style="list-style-type: none"> <li>• <i>Accept</i>: You can accept a new order for processing when you advance to the View Order screen from the <i>New Orders</i> screen.</li> <li>• <i>Begin Picking</i>: You can begin picking an accepted order when you advance to the View Order screen from the <i>Ready to Pick</i> screen.</li> <li>• <i>Begin Shipping</i>: You can begin shipping a picked delivery or ship-for-pickup order when you advance to the View Order screen from the <i>Ready to Ship</i> screen. However, if the order is <a href="#">Under Review</a>, this option is not available.</li> <li>• <i>Begin Receiving</i>: You can begin receiving a ship-for-pickup order when you advance to the View Order screen from the <i>Ready to Receive</i> screen.</li> <li>• <i>Begin Pick Up</i>: You can begin pickup of a picked pickup order or a received ship-for-pickup order when you advance to the View Order screen from the <i>Ready to Pick Up</i> screen.</li> </ul> <p>Note that if a ship-for-pickup order is also sourced out of your current store location, it is not necessary to receive the order. However, regardless of the sourcing location, if the order is <a href="#">Under Review</a>, the option to begin pickup is not available.</p> |
| <b>change the order pickup date</b>                  | <p><b>Error message?</b> A message indicates if the status of the order has changed since you advanced to the screen.</p> <p>Select <b>Change Order Pick Up Date</b> from More Options (  ) at the bottom right to open the <a href="#">Change Order Pick Up Date</a> window.</p> <p>This option is available only for a pickup or ship-for-pickup order, and only if your organization is configured to automatically cancel unclaimed pickup or ship-for-pickup orders after a specified number of days. Also, an error message indicates if the status of the order has changed since you displayed the current screen.</p>   |
| <b>view the packing slip</b>                         | <p>Select <b>View Packing Documents</b> from More Options (  ) at the bottom right to view and optionally print the <a href="#">Packing Slip</a>.</p> <p>Depending on the fulfillment type and the order status, this option may not be available. For example, it's not available before the order is accepted, or when a ship-for-pickup order has been shipped from the sourcing location but not yet received at your current location.</p>  |
| <b>view order history</b>                            | <p>Select <b>View Order History</b> from More Options (  ) at the bottom right to advance to the <i>Order History</i> screen.</p>  |

| Option                         | Procedure  |
|--------------------------------|--|
| <b>cancel the entire order</b> | <p>Select <b>Cancel Order</b> from More Options (  ) at the bottom right to cancel the entire order. The <a href="#">Cancel Order</a> window opens.</p> <p>You might cancel an order if the customer has indicated that they don't want the order. Order Orchestration does not attempt to find another location for the order.</p> <p>Note that canceling a ship-for-pickup order that is shipped to your current location from a different sourcing location is available only after the order has been received.</p>   |
| <b>reject the entire order</b> | <p>Select <b>Reject Order</b> from More Options (  ) at the bottom right to reject the entire order. The <a href="#">Reject Order</a> window opens.</p> <p>You might reject any order if you don't have the stock available to fulfill it.</p> <p><b>What happens when you reject:</b></p> <ul style="list-style-type: none"> <li>• Delivery order, or a ship-for-pickup order that your current location is assigned to ship to the pickup location: Order Orchestration sees if there is another location that can fulfill or source the order.</li> <li>• Pickup order: The customer is notified that the order is not available for pickup and the order status is set to unfulfillable.</li> <li>• Ship-for-pickup order that the customer wants to pick up in your current location: A new sourcing location is assigned for the order. If there isn't another location that can source the order, the order's status is updated to unfulfillable.</li> </ul> |
| <b>cancel an item</b>          | <p>Select <b>Cancel Item</b> from More Options (  ) to the right of the item to cancel the item on the order. This option is available only if your organization supports updates to individual order lines. The <a href="#">Cancel Item</a> window opens.</p> <p>You might cancel an item if the customer has indicated that they don't want the item. Order Orchestration does not attempt to find another location for the item.</p> <p>Note that canceling an item on a ship-for-pickup order that is shipped to your current location from a different sourcing location is available only after the order has been received.</p>  |

| Option                               | Procedure   |
|--------------------------------------|---|
| <b>reject an item</b>                | <p>Select <b>Reject Item</b> from More Options ( <b>•••</b> ) to the right of the item to reject the item on the order. This option is available only if your organization supports updates to individual order lines. The <i>Reject Item</i> window opens.</p> <p>You might reject an item if you don't have the stock available to fulfill it.</p> <p><b>What happens when you reject:</b></p> <ul style="list-style-type: none"> <li>• Delivery order, or a ship-for-pickup order that your current location is assigned to ship to the pickup location: Order Orchestration sees if there is another location that can fulfill or source the item.</li> <li>• Pickup order: The customer is notified that the item is not available for pickup and the item status is set to unfulfillable.</li> <li>• Ship-for-pickup order that the customer wants to pick up in your current location: A new sourcing location is assigned for the item. If there isn't another location that can source the item, the item's status is updated to unfulfillable.</li> </ul> |
| <b>return to the previous screen</b> | Select <b>Done</b> from the bottom right to return to the previous screen.  |

#### Fields at this screen

| Fields              | Description   |
|---------------------|---|
| <b>Order number</b> | The number or code identifying the order in the originating system. If the order is <i>Under Review</i> , this is indicated to the right. |

| Fields                  | Description   |
|-------------------------|---|
| <b>Next action</b>      | <p>The top of the View Order screen displays the next available action for the lines currently displayed, which are based on the list screen where you selected the View option. Possible next actions are:</p> <ul style="list-style-type: none"> <li>• <i>New Order</i>: Displayed when you advance from the New Orders screen.<br/>The displayed order lines have been received from the originating system, created in Order Orchestration, and assigned to your current location for fulfillment (delivery or pickup order) or sourcing (ship-for-pickup order). The status displayed in Order Orchestration is <i>Polled</i>.</li> <li>• <i>Ready to Pick</i>: Displayed when you advance from the Ready to Pick screen.<br/>The displayed order lines have been accepted for processing at your location and are ready to pick.</li> <li>• <i>Ready to Pick Up</i>: Displayed when you advance from the Ready to Pick Up screen for a pickup order or a ship-for-pickup order.<br/>Indicates that the displayed order lines for a pickup order have been picked and are ready for pickup, or that the order lines for a ship-for-pickup order are ready for pickup, regardless of whether the order lines were sourced at another store and received at your current location, or if they were assigned to your current location for both sourcing and pickup.<br/>Note that the <i>View Full Order</i> screen displays an order status of Received for items on a ship-for-pickup order that are ready for pickup, regardless of whether the items were sourced from a different location.</li> <li>• <i>Ready to Receive</i>: Displayed when you advance from the Ready to Receive screen.<br/>The displayed order lines for a ship-for-pickup order have been shipped from the sourcing location to your current location, where the customer wants to pick it up.</li> <li>• <i>Ready to Ship</i>: Displayed when you advance from the Ready to Ship screen.<br/>The displayed order lines for a delivery or ship-for-pickup order have been picked and are ready for shipment, either to the customer (delivery order) or to the pickup location (ship-for-pickup order). This option is not available if the order is <a href="#">Under Review</a>.</li> </ul> |
| <b>Number of units</b>  | The number of units on the order.   |
| <b>Fulfillment Type</b> | <p>A fulfillment type of Delivery, Pickup, or Ship for Pickup is indicated to the right. The express icon (  ) is to the right of the fulfillment type for a delivery or ship-for-pickup order if the carrier assigned to the order is flagged as an express shipper.</p>  |



| Fields                    | Description  |
|---------------------------|--|
| <b>Sourcing locations</b> | <p>The sourcing location(s) are displayed above the items on a ship-for-pickup order only when you advance to this screen from the <a href="#">Ready to Receive</a> screen, and include the location code and the location description of each location that has shipped one or more items on the order to your current location, where the customer picks up the order.</p> <p>If there is more one sourcing location, the screen indicates <b>Sourced from Multiple Locations</b>.</p> <p><b>Items:</b> For each open order line on the order that is assigned to your current store location, the following information is displayed.</p> <p>Depending on the screen where you selected to view the order, order lines in the corresponding status are displayed. For example, if you selected View Order from the <a href="#">Ready to Pick</a> screen, order lines that have been accepted are displayed.</p> <p><b>Not displayed:</b></p> <ul style="list-style-type: none"> <li>• Items that are not in the status related to the list screen you advanced from are not displayed. For example, if you selected View Order from the <a href="#">Ready to Pick</a> screen, items that have already been picked are not displayed</li> <li>• Items on a delivery order that are assigned to a different store location are not displayed on this screen.</li> <li>• Items on a ship-for-pickup order that should be picked up at your current store location, but are not yet in transit, are not displayed at this screen.</li> </ul> <p>You can review all order lines at the <a href="#">View Full Order</a> screen.</p> |
| <b>Item description</b>   | <p>A description of the item.</p> <p>An image of the item may also be displayed.</p>   |
| <b>Item code</b>          | <p>A code identifying the item.</p>  |
| <b>Price</b>              | <p>The price of a single unit of the item.</p>   |
| <b>Available Quantity</b> | <p>The available quantity of the item after subtracting the quantity on any open orders.</p> <p>Since the quantity of the displayed order line is added to the calculated available quantity, the available quantity displayed for two order lines for the same item will differ if the order lines are for different quantities until the order is ready to ship or ready for pickup. For example, if the available quantity is 50, and the quantity on the order line is 5, the available quantity displayed is 55; however, if the quantity on the order line is 2, the available quantity displayed is 52.</p> <p>Not displayed when you advance to this screen from the <a href="#">Ready to Receive</a> screen.</p>  |

| Fields   | Description   |
|--|---|
| <b>Quantity in correct status for next processing step</b> | <p>The current quantity that is:</p> <ul style="list-style-type: none"> <li>• <i>Accepted</i>, indicating it's ready to pick. Displayed when you advance to this screen from the Ready to Pick screen.</li> <li>• <i>Intransit</i>, indicating that the items on the ship-for-pickup order has been shipped from the sourcing location and is ready for receipt at your current location. Displayed when you advance to this screen from the Ready to Receive screen.</li> <li>• <i>New Order</i>, indicating it's ready for acceptance. Displayed when you advance to this screen from the New Orders screen.</li> <li>• <i>Picked</i>: <ul style="list-style-type: none"> <li>– you advance to this screen from the Ready to Pick Up screen if the items on the pickup order are ready for pickup at your current location (provided the order isn't under review)</li> <li>– you advance to this screen from the Ready to Ship screen if the items on the delivery order are ready for shipment to customer from your current location (provided the order isn't under review)</li> <li>– you advance to this screen from the Ready to Ship screen if the items on the ship-for-pickup order are ready for shipment to the pickup store from your current location, or</li> <li>– you advance to this screen from the Ready to Pick Up screen if the items on the ship-for-pickup order are ready for pickup at your current location (provided it is not under review)</li> </ul> </li> </ul> <p>Note that the View Full Order screen displays a status of Received for items on a ship-for-pickup order that are ready for pickup.</p> |
| <b>Sourcing location (unlabeled field)</b>                 | <p>The sourcing location(s) for the order line are displayed for each item only when you advance to this screen from the <i>Ready to Receive</i> screen. The location code and the location description of the location that has shipped the item to your current location, where the customer picks up the order, is indicated.</p>  |
| <b>Order Details:</b>                                      | <p>Information about the customer and the placed location are displayed.</p>  |

| Fields         | Description   |
|----------------|---|
| <b>Sold To</b> | <p>The customer who placed the order. Can include:</p> <ul style="list-style-type: none"> <li>• Company name</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> <p>If the address has been updated in the originating system since the order was originally created, it isn't automatically updated here.</p>  |
| <b>Ship To</b> | <p>The shipping address for a delivery order, if a separate shipping address was specified. Not displayed for a pickup order or a ship-for-pickup order. Can include:</p> <ul style="list-style-type: none"> <li>• Company name</li> <li>• Attention line, if any</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> <p>If the address has been updated in the originating system since the order was originally created, it isn't automatically updated here.</p> |

| Fields                 | Description   |
|------------------------|---|
| <b>Location Detail</b> | <p data-bbox="753 275 1369 331">Includes the location code and description for each of the following:</p> <ul style="list-style-type: none"> <li data-bbox="753 338 1369 426">• <i>Placed at:</i> The location where the order was placed. May represent another store location, the contact center, or the web storefront.</li> <li data-bbox="753 432 1369 768">• <i>Sourced from:</i> The Sourced from location is included for a delivery or ship-for-pickup order, and relates to any items on the order that are eligible for the current processing step. For example, if you advance to the View Order screen from the Ready to Pick screen, the Sourced from location is based on any order lines that are ready to pick, while if you advance to the View Order screen from the New Orders screen, the Sourced from location is based on any order lines that you have not yet accepted. The <i>Sourced from</i> location is: <ul style="list-style-type: none"> <li data-bbox="802 779 1369 835">– <b>Delivery order:</b> This is your current store location.</li> <li data-bbox="802 842 1369 930">– <b>Ship-for-pickup order:</b> The sourcing location indicated varies depending on the processing stage for the items on the order. <ul style="list-style-type: none"> <li data-bbox="850 936 1369 1024">* <i>New:</i> If you have not yet accepted the displayed items, this is your current location.</li> <li data-bbox="850 1031 1369 1119">* <i>Accepted:</i> If you have accepted the displayed items and the next step is to pick them, this is your current location.</li> <li data-bbox="850 1125 1369 1262">* <i>Picked:</i> If you have picked the items and the next step is to ship them to the pickup location, or if the customer wants to pick up the order at your current location, this is your current location.</li> <li data-bbox="850 1268 1369 1461">* <i>Shipped:</i> If the sourcing location has shipped the items to your current location, and your next step is to receive them, this is the location that shipped the items. <b>Sourced from Multiple locations</b> is indicated if the items were shipped from more than one location.</li> <li data-bbox="850 1467 1369 1640">* <i>Received:</i> If you have received the items and they're now ready for pickup, this is the location that shipped the items. <b>Multiple locations</b> is indicated if the items were shipped from more than one location.</li> </ul> </li> </ul> </li> </ul> <p data-bbox="850 1646 976 1673"><b>Summary:</b></p> <ul style="list-style-type: none"> <li data-bbox="850 1680 1369 1768">* Until the items on a ship-for-pickup order are shipped, the sourcing location is your current location.</li> <li data-bbox="850 1774 1369 1906">* After the items on a ship-for-pickup are shipped to your current location, the sourcing location is one or more other locations that ship the items to your current location.</li> </ul> |

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| Fields | Description  |
|--------|--|
|        | <ul style="list-style-type: none"><li>* However, if your current location is both the sourcing location and the pickup location, then the shipment and receiving steps don't take place.<br/><b>Note:</b> The <i>Sourced From</i> information is not relevant to or included for a pickup order.</li><li>• <i>Pick Up at:</i> The location where the customer picks up the pickup or ship-for-pickup order.<br/><b>Note:</b> The <i>Pick Up at</i> location is not relevant to or included for a delivery order.</li></ul> |

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# 5

## Pick List Pull Sheet

**Purpose:** The pull sheet is generated for each order that you have accepted at the [New Orders](#) screen, or the items on the order that you accepted at the [View Order](#) or [View Full Order](#) screens, if configured for your organization for your current store location. The contents of the pick list pull sheet are described below.

| Fields   | Description  |
|--|--|
| <b>Store code and name</b>                       | The code and name identifying the store where the orders were accepted.  |
| <b>Organization (unlabeled field)</b>            | The name of your organization.   |
| <b>User ID</b>                                   | The user ID of the person who accepted the order(s).   |
| <b>date and time generated (unlabeled field)</b> | The date and time when the pick list pull sheet was generated.<br><br>The date and time might not be your local date and time, if the retailer uses a server in a different time zone. For example, if your store location is on Eastern Standard time, and the retailer uses a server that is on Pacific time, the date and time displayed might be earlier than the current time in your location.   |
| <b>Total Orders</b>                              | The total number of orders accepted at this time.  |
| <b>Total Items</b>                               | The total number of different items (order lines) on the accepted order(s).  |
| <b>Total Units</b>                               | The total number of units on all order lines that were accepted.   |
| <b>For every item on the accepted orders:</b>    |  |
| <b>Item #</b>                                    | The number or code identifying the item.   |
| <b>Item Description</b>                          | The description of the item.   |
| <b>Pick Qty</b>                                  | The total quantity of the item to pick for all accepted orders.  |
| <b>Notes</b>                                     | An area to enter any notes about the item.   |
| <b>For each order that was accepted:</b>         |  |
| <b>Order Type</b>                                | Set to: <ul style="list-style-type: none"><li>• <b>Pickup</b> if the customer picks up the order at your current location, where the items are in stock.</li><li>• <b>Delivery</b> if the order ships to the customer.</li><li>• <b>Ship-for-Pickup</b> if the order can be sourced from a different location than the one where the customer wants to pick up the order. Note, however, that a ship-for-pickup can also be sourced from the same location where the customer wants to pick it up.</li></ul> |
| <b>Order #</b>                                   | A number or code identifying the sales order in the originating system.  |

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| <b>Fields</b>           | <b>Description</b>  |
|-------------------------|---|
| <b>Name</b>             | The last and first name or company name of the customer who placed the order. Not necessarily the name of the customer receiving the order, if it's a delivery order. Truncated if it exceeds the available space.                                  |
| <b>Item #</b>           | Your item number or code. Truncated if it exceeds the available space.  |
| <b>Item Description</b> | A description of the item. Truncated if it exceeds the available space.   |
| <b>Quantity Needed</b>  | The quantity of the item that you need to pick.   |
| <b>Carrier</b>          | The code and description identifying the designated carrier for the order. Set to Pick Up for a pickup order. The carrier is listed even for a ship-for-pickup order that is sourced from the same location where the customer wants to pick it up. |

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# 6

## Ready to Pick

**Purpose:** Use this screen to review accepted orders that are ready to be picked, and to select an order to begin the picking process.

**Which orders are displayed?** This screen displays all accepted pickup, delivery, or ship-for-pickup orders that are assigned to your current store location and have not yet been picked. If there are more than 100 new orders, the first 100 orders are displayed, and a message indicates that there are additional orders. You can use the [Search Options](#) to restrict the displayed orders.

### Note:

**When are ship-for-pickup orders listed?** Ship-for-pickup orders are listed only if they are assigned to your current location for sourcing; however, this doesn't necessarily mean that the customer would like to pick up the ship-for-pickup order at your current location. It's also possible that you need to ship the order to a different location for pickup.

If you advance to a different screen and then return to this screen, the list of accepted orders is refreshed: any newly accepted orders are added, and orders that have been picked, rejected, or canceled are removed.


**Under Review?** You can pick an order that is flagged as [Under Review](#); however, you can't ship the order or pick it up until the order is no longer under review.

**Selecting an order for picking:** Highlight an order and select **Begin Picking** to advance to the [Pick Order](#) screen.

**Error message?** A message indicates if the status of the selected orders has changed since the screen displayed the list of orders.

**How to display this screen:** Select **Ready to Pick** (.

### Fields at this screen:

- [Order ID](#), preceded by the icon () indicating if the carrier assigned to a delivery or ship-for-pickup order is flagged as an express shipper, and followed by an indicator if the order is [Under Review](#)
- [Date and Time](#), with a red triangle indicating if the order hasn't been processed within the number of hours defined by your system administrator
- [Customer and Pickup](#)
- [Request ID](#)



 **Note:**

The date and request ID are listed together when you are using a tablet. The date and time, order ID, customer and pickup, and request ID are listed under *Date and Details* when you are using a small screen, such as a mobile device.




- *Fulfillment Type*
- *Lines*: The number of lines ready to pick





 **Note:**

**Additional existing items for displayed orders?** If your organization supports it, the displayed orders might include additional order lines that are not ready for picking at your current location. For example, if items on a delivery order are assigned to two different locations for fulfillment, the number of order lines indicated here includes only order lines that have been assigned to your current store location. Also, if any lines on the order have already been picked at your current location, these lines are not included in the total number of order lines indicated.

**More information:** See [Store Connect Overview](#) for background on processing orders in Store Connect.

**Options at this screen:**

| Option  | Procedure   |
|---|---|
| <b>Search for an order, or limit the results to certain orders</b>  | Use the <a href="#">Search Options</a> , available by clicking the magnifying glass icon (  ) or putting the cursor in the <i>Search Criteria</i> field.  |
| <b>Select an order to begin picking</b>   | Select an order and select <b>Begin Picking</b> to advance to the <a href="#">Pick Order</a> screen.<br><b>Error message?</b> A message indicates if the status of the order selected for picking has changed since the screen displayed the list of orders, and the order is no longer eligible for picking. |
| <b>Select an order to view it and optionally update it (begin picking, view packing documents, view order history, cancel, or reject)</b> | Select an order and click <b>View</b> to advance to the <a href="#">View Order</a> screen.  |
| <b>Select an order to view or print the pack slip</b>   | Select an order and select <b>View Packing Documents</b> from <i>More Options</i> (  ) to display and optionally print the <a href="#">Packing Slip</a> .  |
| <b>Select an order to view order history</b>  | Select an order and click <b>View Order History</b> from <i>More Options</i> (  ) to advance to the <a href="#">Order History</a> screen.  |

| Option                  | Procedure  |
|-------------------------|--|
| <b>Cancel an order</b>  | <p><b>Cancel order?</b> You might cancel an order if the customer has indicated that they don't want the order. Order Orchestration does not attempt to find another location for the order.</p> <p><b>How to cancel:</b> Select an order and select <b>Cancel Order</b> from <i>More Options</i> (  ). The <i>Cancel Order</i> window opens.</p> <p>A message indicates if the status of the order has changed since the screen displayed the list of orders.</p>  |
| <b>Reject an order</b>  | <p><b>Reject order?</b> You might reject any order if you don't have the stock available to fulfill it.</p> <p><b>What happens when you reject:</b></p> <ul style="list-style-type: none"> <li>• Delivery order, or a ship-for-pickup order that your current location is assigned to ship to the pickup location: Order Orchestration sees if there is another location that can fulfill or source the order.</li> <li>• Pickup order: The customer is notified that the order is not available for pickup and the order status is set to unfulfillable.</li> <li>• Ship-for-pickup order that the customer wants to pick up in your current location and is also assigned to your current location for sourcing: A new sourcing location is assigned for the order. If there isn't another location that can source the order, the order's status is updated to unfulfillable.</li> </ul> <p><b>How to reject:</b> Select an order and select <b>Reject Order</b> from <i>More Options</i> (  ). The <i>Reject Order</i> window opens.</p> <p>A message indicates if the status of the order has changed since the screen displayed the list of orders.</p> |
| <b>Additional tasks</b> | <p>Select the <i>Tasks</i> icon (  ) to open a drawer on the left that displays a list of options. See <i>Tasks</i>.</p> <p>These options are also available by opening the <i>Menu</i> option (  ).</p>  |



# 7




## Pick Order


**Purpose:** Use this screen to pick an order that is assigned to your current store location.

**Available when?** This screen is available by selecting **Begin Picking** in the bottom right at the [Ready to Pick](#) screen, the [View Order](#) screen, or the [View Full Order](#) screen for an order that has been accepted but not yet fully picked.


**Options at this screen**

| Option                             | Procedure   |
|------------------------------------|---|
| <b>pick the items on the order</b> | <p><i>By increasing the picked quantity for an item:</i> Increase the number of units on the right-hand side of the screen.</p> <p><i>By scanning items:</i> Use the <i>Scan Item to Add</i> option to scan each unit. Not case-sensitive: ab123 and AB123 are both matches.</p> <p>Select <b>Complete Pick</b> when you are done. This option is available only if:</p> <ul style="list-style-type: none"> <li>• You have completed picking of all displayed order lines, or</li> <li>• All of the order lines are picked, or the lines that aren't picked are canceled or rejected.</li> </ul> <p><b>Picking a partial quantity of an order line:</b> Optionally, if your organization supports it, you can pick a partial quantity of an order line with a quantity of 2 or more by first canceling or rejecting the units that you won't be picking. To cancel or reject a partial quantity of an order line:</p> <ul style="list-style-type: none"> <li>• Select <i>Cancel Item</i> or <i>Reject Item</i> from More Options (  ) to the right of the item. The <i>Cancel Item</i> window or the <i>Reject Item</i> window opens.</li> <li>• At the window, change the <i>Cancel</i> or <i>Reject</i> quantity to the quantity you are canceling or rejecting, and select the <i>Reason</i> for the cancellation or rejection.</li> <li>• After you select <b>OK</b>, the order line quantity is reduced by the canceled or rejected quantity. You can now pick the remaining quantity on the order line, as described above.</li> </ul> <p>See below for a discussion of canceling or rejecting.</p> <p><i>View Packing Documents:</i> The settings in Order Orchestration control whether Store Connect automatically generates the <i>Packing Slip</i> when you complete picking for an order. You can also generate it on demand, as described below.</p> <p>Updates when you pick the items:</p> <ul style="list-style-type: none"> <li>• <i>Delivery order:</i> The order is ready for shipping to the customer.</li> <li>• <i>Pickup order:</i> The order is ready for pickup, and the pickup ready notification email is ready to be generated.</li> <li>• <i>Ship-for-pickup order:</i> If the pickup location is: <ul style="list-style-type: none"> <li>– The same as your current location (the sourcing location), the order is ready for pickup, and the pickup ready notification email is ready to be generated.</li> <li>– Different from your current location (the sourcing location), the order is ready for shipping to the pickup location.</li> </ul> </li> </ul> |
| <b>view the packing slip</b>       | <p>Select <b>View Packing Documents</b> from More Options (  ) at the bottom right to view and optionally print the <i>Packing Slip</i>.</p>   |

| Option                         | Procedure  |
|--------------------------------|--|
| <b>cancel the entire order</b> | <p>Select <b>Cancel Order</b> from More Options (  ) at the bottom right to cancel the entire order. The <a href="#">Cancel Order</a> window opens.</p> <p>You might cancel an order if the customer has indicated that they don't want the order. Order Orchestration does not attempt to find another location for the order.</p>   |
| <b>reject the entire order</b> | <p>Select <b>Reject Order</b> from More Options (  ) at the bottom right to reject the entire order. The <a href="#">Reject Order</a> window opens.</p> <p>You might reject any order if you don't have the stock available to fulfill it.</p> <p><b>What happens when you reject:</b></p> <ul style="list-style-type: none"> <li>• Delivery order, or a ship-for-pickup order that your current location is assigned to ship to the pickup location: Order Orchestration sees if there is another location that can fulfill or source the order.</li> <li>• Pickup order: The customer is notified that the order is not available for pickup and the order status is set to unfulfillable.</li> <li>• Ship-for-pickup order that the customer wants to pick up in your current location: A new sourcing location is assigned for the order. If there isn't another location that can source the order, the order's status is updated to unfulfillable.</li> </ul> |
| <b>cancel an item</b>          | <p>Select <b>Cancel Item</b> from More Options (  ) to the right of the item to cancel the item on the order. This option is available only if your organization supports updates to individual order lines. The <a href="#">Cancel Item</a> window opens.</p> <p>You might cancel an item if the customer has indicated that they don't want the item. Order Orchestration does not attempt to find another location for the item.</p> <p>When you select this option, the <i>Number of units</i> picked is reset to 0.</p>  |

| Option                               | Procedure  |
|--------------------------------------|--|
| <b>reject an item</b>                | <p>Select <b>Reject Item</b> from More Options (  ) to the right of the item to reject the item on the order. This option is available only if your organization supports updates to individual order lines.</p> <p>The <i>Reject Item</i> window opens. At this window, you can reject all units of the order line, or a partial quantity if your organization supports it.</p> <p>You might reject an item if you don't have the stock available to fulfill it.</p> <p><b>What happens when you reject:</b></p> <ul style="list-style-type: none"> <li>• Delivery order, or a ship-for-pickup order that your current location is assigned to ship to the pickup location: Order Orchestration sees if there is another location that can fulfill or source the item.</li> <li>• Pickup order: The customer is notified that the item is not available for pickup and the item status is set to unfulfillable.</li> <li>• Ship-for-pickup order that the customer wants to pick up in your current location: A new sourcing location is assigned for the item. If there isn't another location that can source the item, the item's status is updated to unfulfillable.</li> </ul> <p>When you select this option, the <i>Number of units</i> picked is reset to 0.</p> |
| <b>return to the previous screen</b> | Select <b>X</b> from the top right to return to the previous screen.   |

### Fields at this screen

| Fields                  | Description   |
|-------------------------|---|
| <b>Order number</b>     | The number or code identifying the order in the originating system. If the order is <i>Under Review</i> , this is indicated to the right.   |
| <b>Next action</b>      | The next action indicated is <i>Ready to Pick</i> .   |
| <b>Number of units</b>  | The current number of units picked, and the total number of units on the order.   |
| <b>Fulfillment Type</b> | A fulfillment type of Delivery, Pickup, or Ship for Pickup is indicated to the right. The express icon (  ) is to the right of the fulfillment type for a delivery order if the carrier on the order is flagged as an express shipper. |

**Items:** For each item on the order that is assigned to your current store location and ready to be picked, the following information is displayed.

**Item sequence:** Items are listed in department, class, category sequence. Since the department code is an alphanumeric field, department 110 sorts before department 30. Class and category sort the same way.

Items on a delivery order or a ship-for-pickup order that are assigned to a different store location are not displayed on this screen. You can review all order lines at the [View Full Order](#) screen.

| Fields                             | Description  |
|------------------------------------|--|
| <b>Item description</b>            | A description of the item.<br>An image of the item may also be displayed.  |
| <b>Item code</b>                   | A code identifying the item.   |
| <b>Price</b>                       | The price of a single unit of the item.  |
| <b>Available Quantity</b>          | The available quantity of the item after subtracting the quantity on any open orders, plus the quantity on the displayed order line.<br><br>Since the quantity of the displayed order line is added to the calculated available quantity, the available quantity displayed for two order lines for the same item will differ if the order lines are for different quantities. For example, if the available quantity is 50, and the quantity on the order line is 5, the available quantity displayed is 55; however, if the quantity on the order line is 2, the available quantity displayed is 52.  |
| <b>Quantity Picked</b>             | The current quantity of the order line that has been picked.   |
| <b>Units Needed (to be picked)</b> | The current quantity of the order line that is ready to be picked but has not yet been picked. You can use the <i>Scan Item to Add</i> option to scan each unit.   |
| <b>Order Details:</b>              | Information about the customer and the placed location are displayed.  |
| <b>Sold To</b>                     | The customer who placed the order. Can include: <ul style="list-style-type: none"> <li>• Company name</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> If the address has been updated in the originating system since the order was originally created, it isn't automatically updated here. |

| Fields                  | Description  |
|-------------------------|--|
| <b>Ship To</b>          | <p>The shipping address for a delivery order, if a separate shipping address was specified. For a ship-for-pickup order, this is the store location where the customer wants to pick up the order. For a delivery order, can include:</p> <ul style="list-style-type: none"> <li>• Company name</li> <li>• Attention line, if any</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> <p>For a ship-for-pickup order, this is the store name and address defined in the system originating the order. If the address has been updated in the originating system since the order was originally created, it isn't automatically updated here. However, if the address has been updated through the <a href="#">Edit Ship To Details</a> window at any store location assigned to ship one or more items on the order, the most recently updated address is displayed at all store locations, and printed on the packing slip.</p> |
| <b>Location Detail</b>  | <p>Includes the location code and description for each of the following:</p> <ul style="list-style-type: none"> <li>• <i>Placed at</i>: The location where the order was placed. May represent another store location, the contact center, or the web storefront.</li> <li>• <i>Sourced from</i>: Your current location.<br/><b>Note:</b> The <i>Sourced From</i> information is not relevant to or included for a pickup order.</li> <li>• <i>Pick Up at</i>: The location where the customer picks up the pickup or ship-for-pickup order.<br/><b>Note:</b> The <i>Pick Up at</i> location is not relevant to or included for a delivery order.</li> </ul>   |
| <b>Scan Item to Add</b> | <p>Optionally, you can use the scan item option at the bottom of the screen instead of increasing the quantity to the right of the order line.</p>   |



# 8

## Ready to Receive


**Purpose:** Use this screen to review ship-for-pickup orders that have been received from their sourcing locations, and to select an order to begin the receiving process.

**Which orders are displayed?** This screen displays all ship-for-pickup orders that have been shipped to your current store location from their sourcing locations, and have not yet been marked as received. If there are more than 100 shipped ship-for-pickup orders, the first 100 orders are displayed, and a message indicates that there are additional orders. You can use the [Search Options](#) to restrict the displayed orders.


**Additional order lines for displayed orders?** If your organization supports it, the displayed orders might include additional order lines that are not ready for receiving. These order lines are not displayed here or included in the order line totals. For example, if items on the order are shipped from two different sourcing locations, or if one of the items is available at your current store location, only the items that have been shipped are available for receiving. In this situation, the number of order lines displayed here includes only order lines that have been shipped to your current store location.

If you advance to a different screen and then return to this screen, the list of shipped ship-for-pickup orders is refreshed: any newly shipped ship-for-pickup orders are added, and orders that have been received, rejected, or canceled are removed.

**Selecting an order for receiving:** Highlight an order and select **Begin Receiving** to advance to the [Receive Order](#) screen.

**How to display this screen:** Select **Ready to Receive** ()

### Fields at this screen:

- For each order displayed on the screen:
  - *Order ID*, preceded by the icon () indicating if the carrier on the order is flagged as an express shipper, and followed by an indicator if the order is [Under Review](#)
  - *Date and Time*
  - *Customer*
  - *Request ID*

#### **Note:**



The date and time, order ID, customer, and request ID are listed under *Date and Details* when you are using a small screen, such as a mobile device or phone.




- *Fulfillment Type* of Ship for Pickup.
- *Lines*: The number of lines that are ready to receive.

- *Scan Order to Begin Receiving*: Optionally, use this field at the bottom of the screen to enter or scan an order number to receive and advance to the Receive Order screen, where you can confirm receipt of the order. Typically, you can scan the barcode that is printed on [Pack Slip](#). Note that this option is available only if you haven't highlighted an order displayed in the list.

**More information:** See [Store Connect Overview](#) for background on processing ship-for-pickup orders in Store Connect.

**Options at this screen:**

| Option  | Procedure   |
|---|---|
| <b>Search for an order, or limit the results to certain orders</b>  | Use the <a href="#">Search Options</a> , available by clicking the magnifying glass icon (  ) or putting the cursor in the <a href="#">Search Criteria</a> field.   |
| <b>Scan an order to begin receiving</b>   | Use the <i>Scan Order to Begin Receiving</i> option at the bottom of the screen to select an order for receiving at your current location. If you receive a pack slip for a ship-for-pickup order, you can scan the barcode on the pack slip to advance to the <a href="#">Receive Order</a> screen, where you can confirm receipt of the order. Not case-sensitive; AB123 and ab123 are both matches.<br><br>This option is available only if you haven't highlighted an order from the list. Also, you can scan an order number only if it is included in the list of displayed orders. If your scan doesn't match, you can use the Search Options to limit the displayed orders to a smaller list that includes the order. |
| <b>Select an order to begin receiving</b>   | Select an order and select <b>Begin Receiving</b> to advance to the <a href="#">Receive Order</a> screen, where you can confirm receipt of the order.<br><br><b>Error message?</b> A message indicates if the status of the order selected for receiving has changed since the screen displayed the list of orders, and the order is no longer eligible for receiving.  |
| <b>Select an order to view it and optionally update it (begin receiving, view packing documents, view order history, or reject)</b> | Select an order and click <b>View</b> to advance to the <a href="#">View Order</a> screen.  |
| <b>Select an order to view order history</b>  | Select an order and click <b>View Order History</b> from <i>More Options</i> (  ) to advance to the <a href="#">Order History</a> screen.  |

| Option                  | Procedure  |
|-------------------------|--|
| <b>Reject an order</b>  | <p><b>Reject order?</b> You might reject any order if it was damaged in shipping or the wrong items were sent.</p> <p><b>What happens when you reject:</b> When you reject a ship-for-pickup order that has been shipped to your current store location, Order Orchestration sees if there is another sourcing location that can ship the order to your location.</p> <p><b>How to reject:</b> Select an order and select <b>Reject Order</b> from <i>More Options</i> (). The <i>Reject Order</i> window opens.</p> <p><b>Cancel?</b> You can't cancel an order at this screen. If the customer no longer wants to pick up the order, you can first receive the order, and then cancel it instead of confirming pickup.</p> <p>A message indicates if the status of the order has changed since the screen displayed the list of orders.</p> |
| <b>Additional tasks</b> | <p>Select the <i>Tasks</i> icon () to open a drawer on the left that displays a list of options. See <a href="#">Tasks</a>.</p> <p>These options are also available by opening the <i>Menu</i> option ().</p>   |

# 9

## Receive Order

**Purpose:** Use this screen to receive a ship-for-pickup order that has been shipped to your current store location, where the customer can pick it up.

**Available when?** This screen is available by selecting **Begin Receiving** in the bottom right at the [Ready to Receive](#) screen, the [View Order](#) screen, or the [View Full Order](#) screen for an order that includes one or more items shipped to your current store location for pickup by the customer.

You can also advance to this screen by scanning the barcode on a shipment at the *Ready to Receive* screen.



**Items sourced from your current location:** This screen is not available for a ship-for-pickup order that only contains items that are assigned to your current store location for both sourcing and pickup, because in this case, the receipt step isn't necessary. Instead, after you accept and pick the order, it is then available for pickup at the Ready for Pickup screen, similar to a pickup order.

**Are all items on the order listed?** If your organization supports it, there might be additional items on the order that weren't included in the current shipment to your location. For example, if other items shipped separately, these items might be available for receiving at a later date. In this case, these items are not listed at the Receive Order screen for the current shipment to your location.

**Items listed but not in shipment?** If the items have all been shipped from multiple sourcing locations and not yet received, all sourced items are listed at this screen. For example, one item on the order was sourced from location A and one was sourced from location B, and both items have been shipped to your current location. In this case, both items are listed at this screen, even though they were shipped separately. However, items that haven't been shipped yet from a sourcing location aren't listed.


**Options at this screen**

| Option                                | Procedure  |
|---------------------------------------|--|
| <b>receive the items on the order</b> | <p><i>By increasing the received quantity for an item:</i> Increase the number of units on the right-hand side of the screen.</p> <p><i>By scanning items:</i> Use the <i>Scan Item to Add</i> option to scan each unit.</p> <p>Select <b>Complete Receiving</b> when you are done.</p> <p><i>Partial receipt without rejecting:</i> If your organization supports it, when you select <b>Complete Receiving</b> without confirming the full quantity of each order line, a window confirms that you are performing a partial receipt at this time. For example, you might receive a partial quantity if you're unable to complete receiving, but can finish later. If you don't reject any of the units to receive, the unreceived order lines or units remain eligible for receipt at a later time.</p> <p><i>Partial receipt with rejecting:</i> If your organization supports it, you can also receive a partial quantity of an order line with a quantity of 2 or more by first rejecting the units that you won't be receiving. For example, you might reject a partial quantity if any of the units were damaged in shipment, or are missing. To reject a partial quantity of an order line:</p> <ul style="list-style-type: none"> <li>• Select <i>Reject Item</i> from More Options ( <b>•••</b> ) to the right of the item. The <i>Reject Item</i> window opens.</li> <li>• At the window, change the <i>Reject</i> quantity to the quantity you are rejecting, and select the <i>Reason</i> for the rejection.</li> <li>• After you select <b>OK</b>, the order line quantity is reduced by the rejected quantity. You can now receive the remaining quantity on the order line, as described above.</li> </ul> <p>See below for a discussion of rejecting.</p> <p><i>View Packing Documents:</i> The settings in Order Orchestration control whether Store Connect automatically generates the <i>Packing Slip</i> when you complete receiving an order at your current location.</p> <p>When you complete receiving, an error message indicates if the status of the order has changed since you advanced to the screen, and the order can't be received.</p> |
| <b>set all units to received</b>      | <p>Optionally, select <i>Set All Units to Received</i> to confirm receipt of all listed items, and then select <i>Complete Receiving</i>. The option to set all units to received is available only when the displayed items were shipped from a single sourcing location.</p> <p>When you complete receiving, an error message indicates if the status of the order has changed since you advanced to the screen, and the order can't be received.</p>  |

| Option   | Procedure   |
|--|---|
| <b>restrict the displayed items based on the sourcing location that shipped the items to your current location</b> | <p>If items have been shipped to your current location from multiple sourcing locations, the message <b>Sourced from Multiple Locations</b> is displayed at the top of the screen, and the location code and description of each of these sourcing locations is displayed.</p> <p>A check box next to each sourcing location is selected by default. To remove the items shipped from a sourcing location from display on this screen, clear the check box next to the sourcing location at the top of the screen.</p>  |
| <b>reject the entire order</b>   | <p>Select <b>Reject Order</b> from More Options () at the bottom right to reject the entire order. The <a href="#">Reject Order</a> window opens.</p> <p>You might reject an order if the entire order was damaged in transit.</p> <p><b>What happens when you reject:</b> When you reject a ship-for-pickup order that has been shipped to your current store location, Order Orchestration sees if there is another location that can source the order and ship it to your location.</p> <p><b>Cancel?</b> You can't cancel an order at this screen. If the customer no longer wants to pick up the order, you can first receive the order, and then cancel it instead of confirming pickup.</p>   |
| <b>reject an item</b>  | <p>Select <b>Reject Item</b> from More Options () to the right of the item to reject the item on the order. This option is available only if your organization supports updates to individual order lines.</p> <p>The <a href="#">Reject Item</a> window opens. At this window, you can reject all units of the order line, or a partial quantity if your organization supports it.</p> <p>You might reject an item if it was damaged in transit, or missing.</p> <p><b>What happens when you reject:</b> When you reject an item on a ship-for-pickup order that has been shipped to your current store location, Order Orchestration sees if there is another location that can source the item and ship it to your location.</p> <p><b>Cancel?</b> You can't cancel an item at this screen. If the customer no longer wants to pick up the item, you can first receive the item, and then cancel it instead of confirming pickup.</p> |
| <b>return to the previous screen</b>   | <p>Select <b>X</b> from the top right to return to the previous screen.</p>   |

#### Fields at this screen

| Fields              | Description  |
|---------------------|--|
| <b>Order number</b> | The number or code identifying the order in the originating system. If the order is currently <a href="#">Under Review</a> , this is indicated to the right. |

| Fields  | Description  |
|---|--|
| <b>Next action</b>  | The next action indicated is <i>Ready to Receive</i> .   |
| <b>Lines Received</b>   | The current number of order lines that you have confirmed as received, and the total number of order lines that have been shipped from a different sourcing location. For example, if 3 order lines were shipped and you haven't yet confirmed receipt of any of these lines, the Lines Received indicated is 0 of 3.  |
| <b>Sourcing locations (labeled Sourced from Multiple Locations)</b> | <p>If more than one sourcing location is shipping items to your current location for customer pickup, the message Sourced from Multiple Locations is displayed, followed by the code and description of each sourcing location.</p> <p>Optionally, you can clear the check box next to one of the sourcing locations to remove the item(s) shipped from that location from the screen.</p> |
| <b>Fulfillment Type</b>   | <p>A fulfillment type of Ship for Pickup is indicated to the right. The express icon (  ) is to the right of the fulfillment type if the carrier assigned to the order by the originating system is flagged as an express shipper.</p>  |
| <b>Set All Units to Received</b>                                    | This option is available above the items if a single sourcing location shipped all the items to your current store location.   |
| <b>Items:</b>   | <p>For each item on the order that has been shipped to your current store location and ready to be received, the following information is displayed.</p> <p>Items that have not yet been shipped to your current store location are not displayed on this screen. You can review all order lines at the <a href="#">View Full Order</a> screen.</p>  |
| <b>Item description</b>   | <p>A description of the item.</p> <p>An image of the item may also be displayed.</p>   |
| <b>Item code</b>  | <p>A code identifying the item, for example, Item ABCDE where ABCDE is the item code.</p> <p>Same item listed more than once? If your organization supports it, it's possible that units of the same item could be sourced and shipped from more than one location.</p>  |
| <b>Price</b>  | The price of a single unit of the item.  |
| <b>Sourcing location (unlabeled field)</b>                          | The code and description of the location sourcing the item.  |
| <b>Quantity Received (unlabeled field)</b>                          | The current quantity of the order line that has been flagged as received.  |
| <b>Units Needed (to be received)</b>                                | The current quantity of the order line that is ready to be received but has not yet been flagged as received. You can also use the <i>Scan Item to Add</i> option to scan each unit, or the <i>Set All Units to Received</i> option at the top of the screen, if it's available.   |
| <b>Order Details:</b>   | Information about the customer and the locations where the order was placed, sourced, and selected for pickup are displayed.   |

| Fields                  | Description  |
|-------------------------|--|
| <b>Sold To</b>          | <p>The customer who placed the order. Can include:</p> <ul style="list-style-type: none"> <li>• Company name</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> <p>If the address has been updated in the originating system since the order was originally created, it isn't automatically updated here.</p> |
| <b>Location Detail</b>  | <p>Includes the location code and description for each of the following:</p> <ul style="list-style-type: none"> <li>• <i>Placed at</i>: The location where the order was placed. May represent another store location, the contact center, or the web storefront.</li> <li>• <i>Sourced from</i>: The location that shipped the items to your current location. <b>Multiple locations</b> indicates that the items were sourced from and shipped from more than one location.</li> <li>• <i>Pick Up at</i>: Your current location.</li> </ul>  |
| <b>Scan Item to Add</b> | <p>Optionally, you can use the scan item option at the bottom of the screen instead of increasing the quantity to the right of the order line.</p>   |



# 10

## Ready to Ship

**Purpose:** Use this screen to:

- Review delivery orders that have been picked and are ready to be shipped to the customer.
- Review ship-for-pickup orders that have been picked at your current location, and are ready to be shipped to the pickup location.
- Select a delivery order to confirm shipment to the customer.
- Select a ship-for-pickup to confirm shipment from your current location to the pickup location.

 **Note:**


**When are ship-for-pickup orders listed?** Ship-for-pickup orders are listed only if they are assigned to your current location for sourcing, but the customer wants to pick them up at a different location.

If you advance to a different screen and then return to this screen, the list of picked orders is refreshed: any newly accepted picked are added, and orders that have been shipped, rejected, or canceled are removed.


**Under review?** If a delivery or ship-for-pickup order is currently under review, the option to **Begin Shipping** is greyed out (not available).

**How many orders are displayed?** If there are more than 100 delivery or ship-for-pickup orders that have been picked, the first 100 orders are displayed, and a message indicates that there are additional orders. You can use the [Search Options](#) to restrict the displayed orders.

**Selecting an order for shipment:** Highlight an order and select **Begin Shipping** to advance to the [Ship Order](#) screen.

**How to display this screen:** Select **Ready to Ship** ()

**Fields at this screen:**

- [Order ID](#), preceded by the icon () indicating if the carrier assigned to the order is flagged as an express shipper, and followed by an indicator if the order is [Under Review](#)
- [Date and Time](#), with a red triangle indicating if the order hasn't been processed within the number of hours defined by your system administrator
- [Customer and Pickup](#)
- [Request ID](#)

 **Note:**

The date and request ID are listed together when you are using a tablet. The date and time, order ID, customer and pickup, and request ID are listed under *Date and Details* when you are using a small screen, such as a mobile device or phone.



- *Fulfillment Type* of Delivery or Ship for Pickup
- *Lines*: The number of lines ready to ship






 **Note:**

**Additional existing items for displayed orders?** If your organization supports it, the displayed orders might include additional order lines that are not ready for shipment from your current location. For example, if items on a delivery order are assigned to two different locations for fulfillment, the number of order lines indicated here includes only order lines that have been assigned to your current store location. Also, if any lines on the order have already been shipped from your current location, these lines are not included in the total number of order lines indicated.

**More information:** See [Store Connect Overview](#) for background on processing delivery or ship-for-pickup orders in Store Connect.

**Options at this screen:**

| Option   | Procedure   |
|--|---|
| <b>Search for an order or limit the results to certain orders</b>  | Use the <a href="#">Search Options</a> , available by clicking the magnifying glass icon (  ) or putting the cursor in the <i>Search Criteria</i> field.  |
| <b>Select an order to begin the shipment process</b>   | Select an order and click <b>Begin Shipping</b> to advance to the <a href="#">Ship Order</a> screen. This option is available only if the order isn't <a href="#">Under Review</a> .<br><b>Note:</b> When manual shipping is enabled, this screen is entitled the <b>Ship order Manually</b> screen.<br><b>Error message?</b> A message indicates if the status of the order selected for shipping has changed since the screen displayed the list of orders, and the order is no longer eligible for shipping. |
| <b>Select an order to view it and optionally update it (begin shipping, view packing documents, view order history, cancel, or reject)</b> | Select an order and click <b>View</b> to advance to the <a href="#">View Order</a> screen.  |
| <b>Select an order to view or print the pack slip</b>  | Select an order and select <b>View Packing Documents</b> from <i>More Options</i> (  ) to display and optionally print the <a href="#">Packing Slip</a> .  |

| Option                                       | Procedure   |
|--|---|
| <b>Select an order to view order history</b> | Select an order and click <b>View Order History</b> from <i>More Options</i> (  ) to advance to the <i>Order History</i> screen.   |
| <b>Cancel an order</b>                       | <p><b>Cancel order?</b> You might cancel an order if the customer has indicated that they don't want the order. Order Orchestration does not attempt to find another location for the order.</p> <p><b>How to cancel:</b> Select an order and select <b>Cancel Order</b> from <i>More Options</i> (  ). The <i>Cancel Order</i> window opens.</p> <p>A message indicates if the status of the order has changed since the screen displayed the list of orders.</p>   |
| <b>Reject an order</b>                       | <p><b>Reject order?</b> You might reject any order if you don't have the stock available to fulfill it.</p> <p><b>What happens when you reject:</b> When you reject a delivery order, or a ship-for-pickup order that is assigned to your current location for sourcing, Order Orchestration sees if there is another location that can fulfill or source the order.</p> <p><b>How to reject:</b> Select an order and select <b>Reject Order</b> from <i>More Options</i> (  ). The <i>Reject Order</i> window opens.</p> <p>A message indicates if the status of the order has changed since the screen displayed the list of orders.</p> |
| <b>Additional tasks</b>                      | <p>Select the <i>Tasks</i> icon (  ) to open a drawer on the left that displays a list of options. See <i>Tasks</i>.</p> <p>These options are also available by opening the <i>Menu</i> option (  ).</p>   |

# 11

## Ship Order

**Purpose:** Use this screen to confirm shipment of a delivery order that is assigned to your current store location, or shipment of a ship-for-pickup order that is assigned to your current store location for sourcing but not for pickup.







### Note:

When manual shipping is in use, the title of this screen is **Ship Order Manually**. Also, depending on your selections at this screen, the title displayed can change to **Ship Partial Order** or **Ship Partial Order Manually**. See below for more information.

**Available when?** This screen is available by selecting **Begin Shipping** in the bottom right at the [Ready to Ship](#) screen, the [View Order](#) screen, or the [View Full Order](#) screen for a delivery order or a ship-for-pickup that has been picked but not yet fully shipped, and that is not currently [Under Review](#).

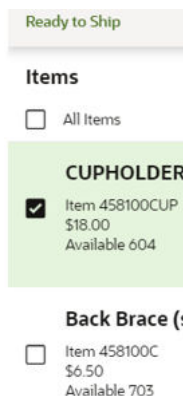
### Options at this screen

| Option  | Procedure  |
|---|--|
| <b>confirm shipment of all the items on the order using normal shipping</b> | <ol style="list-style-type: none"> <li>1. If the <i>Package Weight</i> field is displayed and has not defaulted from the order, enter the weight of the package. This field is displayed only if configured for your organization.</li> <li>2. If the <i>Box Size</i> field is displayed, select a size from the drop-down list or, optionally, select <b>Irregular Size</b>.</li> <li>3. If you selected <b>Irregular Size</b> for the <i>Box Size</i>, enter the <i>Length</i>, <i>Width</i>, and <i>Height</i>. Otherwise, if you selected a different <i>Box Size</i>, its dimensions default in these fields and can't be changed.</li> <li>4. Optionally, select a different <i>Carrier</i>.</li> <li>5. Select <b>Complete Shipping</b>.</li> </ol> |
|   | <p><b>When shipment is confirmed:</b></p> <ul style="list-style-type: none"> <li>• The barcode shipping label or <i>Packing Slip</i>, or both, are generated if configured for your organization.</li> <li>• An email is sent to the customer indicating that the order has shipped.</li> <li>• The order is no longer displayed at the <i>Ready To Ship</i> screen.</li> </ul>  |
|   | <p><b>If an error is displayed:</b> The screen might display an error when you select <b>Complete Shipping</b> if there was a problem communicating with the shipping service, or if the shipping address is incorrect or incomplete. If the message indicates that there is an issue with the shipping address, you can select the pencil icon (  ) next to the shipping address to open the <i>Edit Ship To Details</i> window, and correct the address.</p>  |
|   | <p><b>If the status of the order lines have changed:</b> A message indicates if the status of any of the lines to be shipped has changed, and are no longer eligible for shipment. This could occur if, for example, the customer has recently canceled the order. When this occurs, you return to the Ready to Ship screen.</p>   |
|   | <p><b>Packing slip needed?</b> Depending on the configuration for your organization, the <i>Packing Slip</i> might not be generated automatically when you confirm shipment of a delivery order or a ship-for-pickup order. If you need to print the packing slip, select View Packing Documents, as described below, before selecting Complete Shipment.</p>  |

| Option   | Procedure  |
|--|--|
| <p><b>confirm shipment of all the items on the order using manual shipment (or confirm shipment if normal shipping is not enabled)</b></p> | <ol style="list-style-type: none"> <li>1. If <i>normal shipping</i> is enabled, you can select <b>Change to Ship Order Manually</b> from More Options (  ) at the bottom right to perform a manual shipment in which you enter the tracking number.<br/>This step is not required if your current store location supports just manual shipping.</li> <li>2. The <i>Package Weight</i> and <i>Box Size</i> are removed from the screen.</li> <li>3. Complete entry of the <i>Tracking Number</i> and change the <i>Carrier</i>, if needed.</li> <li>4. Select <b>Complete Shipping</b>.</li> </ol> <p><b>Note:</b> Optionally, you can switch back to normal shipping, if your current store location supports it, by selecting <b>Revert to Normal Shipping</b> from More Options (  ) at the bottom right.</p> <p><b>When shipment is confirmed:</b></p> <ul style="list-style-type: none"> <li>• An email is sent to the customer indicating that the order has shipped.</li> <li>• The order is no longer displayed at the <i>Ready To Ship</i> screen.</li> </ul> <p><b>If an error is displayed:</b> The screen might display an error when you select <b>Complete Shipping</b> if there was a problem communicating with the shipping service, or if the shipping address is incorrect or incomplete. If the message indicates that there is an issue with the shipping address, you can select the pencil icon (  ) next to the shipping address to open the <i>Edit Ship To Details</i> window, and correct the address.</p> <p><b>If the status of the order lines have changed:</b> A message indicates if the status of any of the lines to be shipped has changed, and are no longer eligible for shipment. This could occur if, for example, the customer has recently canceled the order. When this occurs, you return to the Ready To Ship screen.</p> |

| Option                                       | Procedure   |
|--|---|
| <b>confirm partial shipment of the order</b> | <p>The option to confirm a partial shipment is available only if your organization supports it.</p> <ol style="list-style-type: none"> <li>Optionally, select <b>Change to Ship Partial Order</b> from More Options (  ) at the bottom right to confirm a partial shipment of the order.<br/>The screen title changes to <b>Ship Partial Order</b> if you are using normal shipping, or to <b>Ship Partial Order Manually</b> if you are using manual shipping.</li> <li><b>Decreasing quantities:</b> If your organization supports shipping partial quantities, you can now use the up and down arrows for the picked unit quantity for each order line as needed if your organization supports partial updates to individual order lines. For example, if you are only shipping one unit out of two ordered, decrease the quantity from 2 to 1, or decrease it to 0 if you are not shipping that order line at all at this time. If you decrease the quantity of an order line to 0, you can also increase it back up to the full picked quantity if needed.<br/>If a <i>Package Weight</i> has defaulted based on the shipping weights defined for the items when the order was submitted to Order Orchestration, decreasing or increasing the quantity of an order line recalculates the <i>Package Weight</i>, based on the shipping weights defined in the system where the order originated. For example, if the order includes 5 units, each weighing a pound, the <i>Package Weight</i> defaults to 5 pounds, and if you reduce the number of units to 3, the <i>Package Weight</i> changes automatically to 3 pounds.<br/>If you had overridden the <i>Package Weight</i>, reducing the units to ship still reduces the <i>Packing Weight</i> based on the unit weight. For example, if the order includes 3 units, each with a shipping weight of one pound, the <i>Package Weight</i> defaults to 3. If you increase the <i>Package Weight</i> to 5, but then reduces the quantity by one unit, the <i>Package Weight</i> is reset to 2, based on the 2 remaining units to ship.<br/>If the <i>Package Weight</i> didn't default from the originating system, it doesn't update automatically if you change the number of units to ship. For example, each unit weighs 1 pound, but a shipping weight wasn't originally defined when the order was created. If you enter a <i>Package Weight</i> of 3, but then reduce the units to ship by 2 units, the <i>Package Weight</i> remains set to 3.</li> <li><b>Selecting or deselecting order lines:</b> You can use the check box next to an order line to include it in or exclude it from the shipment if your organization supports partial updates to orders, but not partial quantity updates to individual order lines. For example, if you are shipping one item on the order at this time, but not another item, select the first item and leave the other item unselected.</li> </ol> |


| Option | Procedure |
|--------|-----------|
|--------|-----------|



The All Items check box at the top is deselected if you are shipping one or more selected order lines, but not the entire order.

4. See the additional steps and notes above on how to confirm shipment using *normal shipping* or manual shipping.
5. Select **Complete Shipping**.

**Note:** Optionally, you can switch back to shipping the full order by selecting **Revert to Ship Full Order** from More

Options (  ) at the bottom right.


**When shipment is confirmed:**

- The barcode shipping label or *Packing Slip*, or both, are generated if configured for your organization.
- An email is sent to the customer indicating that the order has shipped.
- The order continues to be displayed at the *Ready To Ship* screen, with the number of lines decreased by any lines you just shipped.


**edit the shipping address**

Optionally, select the pencil icon (  ) next to the shipping address to open the *Edit Ship To Details* window.

**view the packing slip**




Select **View Packing Documents** from More Options (  ) at the bottom right to view and optionally print the *Packing Slip*.

**cancel the entire order**


Select **Cancel Order** from More Options (  ) at the bottom right to cancel the entire order. The *Cancel Order* window opens.

You might cancel an order if the customer has indicated that they don't want the order. Order Orchestration does not attempt to find another location for the order.



| Option                               | Procedure   |
|--------------------------------------|---|
| <b>reject the entire order</b>       | <p>Select <b>Reject Order</b> from More Options (  ) at the bottom right to reject the entire order.</p> <p>You might reject any order if you don't have the stock available to fulfill it.</p> <p><b>What happens when you reject:</b> Order Orchestration sees if there is another location that can fulfill the order.</p>  |
| <b>cancel an item</b>                | <p>Select <b>Cancel Item</b> from More Options (  ) to the right of the item to cancel the item on the order. This option is available only if your organization supports updates to individual order lines. The <i>Cancel Item</i> window opens.</p> <p>You might cancel an item if the customer has indicated that they don't want the item. Order Orchestration does not attempt to find another location for the item.</p>   |
| <b>reject an item</b>                | <p>Select <b>Reject Item</b> from More Options (  ) to the right of the item to reject the item on the order. This option is available only if your organization supports updates to individual order lines.</p> <p>The <i>Reject Item</i> window opens. At this window, you can reject all units of the order line, or a partial quantity if your organization supports it.</p> <p>You might reject an item if you don't have the stock available to ship it.</p> <p><b>What happens when you reject:</b> When you reject an item on a delivery order, Order Orchestration sees if there is another location that can fulfill the item.</p> |
| <b>return to the previous screen</b> | Select <b>X</b> from the top right to return to the previous screen.  |

#### Fields at this screen

| Fields                  | Description   |
|-------------------------|---|
| <b>Order number</b>     | The number or code identifying the order in the originating system.   |
| <b>Next action</b>      | The next action indicated is <i>Ready to Ship</i> .   |
| <b>Number of units</b>  | The total number of units on the order.   |
| <b>Fulfillment Type</b> | A fulfillment type of Delivery or Ship for Pickup is indicated to the right. The express icon (  ) is to the right of the fulfillment type if the carrier on the order is flagged as an express shipper. |

**Items:** For each item on the order that is assigned to your current store location and ready to be shipped, the following information is displayed.

Items on the order that are assigned to a different store location for shipping or sourcing are not displayed on this screen. You can review all order lines at the [View Full Order](#) screen.

| Fields   | Description   |
|--|---|
| <b>All items</b>   | Optionally, clear this check box if you would like to ship one or more, but not all order lines. This check box is available only if your organization supports shipping one or more order lines without shipping the entire order, but does not support shipping a partial quantity of an order line, and if you have selected Change to Ship Partial Order.   |
| <b>Unlabeled check box</b>   | Optionally, clear this check box if you do not want to ship this item at the current time, but want to ship one or more other items. This check box is available only if your organization supports shipping one or more order lines without shipping the entire order, but does not support shipping a partial quantity of an order line, and if you have selected Change to Ship Partial Order.   |
| <b>Item description</b>  | A description of the item.<br>An image of the item may also be displayed.   |
| <b>Item code</b>   | A code identifying the item.  |
| <b>Price</b>   | The price of a single unit of the item.   |
| <b>Available Quantity</b>  | The available quantity of the item after subtracting the quantity on any open orders.   |
| <b>Quantity Picked</b>   | The current quantity of the order line that has been picked.  |
| <b>Shipping Details:</b> Use the following fields to enter information about the shipment. |   |
| <b>Package Weight</b>  | Enter the weight of the package if it has not defaulted from the total shipping weight of the items to ship for the order, or if it is incorrect. The unit of measure, such as grams (g), is indicated. Included only for normal shipping.<br><b>Note:</b> If your entry is less than 1.0, it is rounded to the nearest whole number on the shipping label. For example, if your entry is .5, the weight on the shipping label is rounded up to 1.0. If your entry is 1.4, the weight on the shipping label is rounded down to 1.0. |
| <b>Box Size</b>  | Select the box size for the shipment from the drop-down list. The defined dimensions of the selected box size are indicated in the <i>Length</i> , <i>Width</i> , and <i>Height</i> . Or select <b>Irregular Size</b> if you need to enter the length, width, and height. Included only for normal shipping.<br>If there is only one box size defined in Order Orchestration, that box size and its dimensions default.   |
| <b>Length</b>  | The length of the box. Defaults from a defined box size, or you can enter the length if you select <b>Irregular Size</b> . The unit of measure, such as cm, is indicated. Included only for normal shipping.<br><b>Note:</b> If you are entering the length, the number you enter can't be more than 99 and can't be less than 1. The length will be rounded to the nearest whole number. For example, if your entry is 1.3, the length will be rounded to 1.   |


| Fields  | Description   |
|---|---|
| <b>Width</b>  | <p>The width of the box. Defaults from a defined box size, or you can enter the width if you select <b>Irregular Size</b>. The unit of measure, such as cm, is indicated. Included only for normal shipping.</p> <p><b>Note:</b> If you are entering the width, the number you enter can't be more than 99 and can't be less than 1. The width will be rounded to the nearest whole number. For example, if your entry is 1.3, the width will be rounded to 1.</p>      |
| <b>Height</b>   | <p>The height of the box. Defaults from a defined box size, or you can enter the height if you select <b>Irregular Size</b>. The unit of measure, such as cm, is indicated. Included only for normal shipping.</p> <p><b>Note:</b> If you are entering the height, the number you enter can't be more than 99 and can't be less than 1. The height will be rounded to the nearest whole number. For example, if your entry is 1.3, the height will be rounded to 1.</p> |
| <b>Carrier</b>  | <p>The default carrier to ship orders is displayed. Optionally, you can select a different carrier from the drop-down list.</p>   |
| <b>Tracking Number</b>  | <p>If you are using manual shipping, you might need to enter a tracking number if required based on your organization configuration. Otherwise, if you are using <a href="#">normal shipping</a>, the tracking number is not displayed here, and will be assigned automatically.</p>  |
| <b>Order Details:</b> Information about the customer and the placed location are displayed. |   |

| Fields         | Description   |
|----------------|---|
| <b>Ship To</b> | <p>The shipping address for the order. For a delivery order, this might be the same as the sold-to address. For a ship-for-pickup order, this is the address of the pickup location. Can include:</p> <ul style="list-style-type: none"> <li>• Company name</li> <li>• Attention line, if any</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> <p>If the address for a delivery order has been updated in the originating system since the order was originally created, it isn't automatically updated here.</p> <p>If needed, you can update the shipping address for this order at the <a href="#">Edit Ship To Details</a> window. However, if the address has been updated through the <a href="#">Edit Ship To Details</a> window at any store location assigned to ship one or more items on the order, the most recently updated address is displayed at all store locations, and printed on the packing slip.</p> <p>If you change the shipping address, other options you have selected at this screen, such as the carrier or box size, are reset to their previous settings.</p> |
| <b>Sold To</b> | <p>The sold-to customer's address. For a delivery order, this might be the same as the shipping address. Can include:</p> <ul style="list-style-type: none"> <li>• Company name</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> <p>If the address has been updated in the originating system since the order was originally created, it isn't automatically updated here.</p>   |

| Fields                 | Description  |
|------------------------|--|
| <b>Location Detail</b> | <p>Includes the location code and description for each of the following:</p> <ul style="list-style-type: none"> <li>• <i>Placed at</i>: The location where the order was placed. May represent another store location, the distribution center, or the web storefront.</li> <li>• <i>Sourced from</i>: Your current location.</li> <li>• <i>Pick Up at</i>: The location where the customer picks up the ship-for-pickup order.</li> </ul> <p><b>Note:</b> The <i>Pick Up at</i> location is not relevant to or included for a delivery order.</p> |

## Edit Ship To Details

Use this window to update the ship-to name and address for a delivery or ship-for-pickup order. This information defaults from the system that submitted the order, but you might need to edit it if, for example, the postal code is incorrect and would prevent the order from being delivered. The updated information is printed on the [Pack Slip](#).

**How to display this window:** Select the pencil icon (  ) to the right of the Ship To name and address at the [Ship Order](#) (or *Ship Order Manually*) screen.

**Changing the ship-to name and address:** Optionally, change any of the displayed fields, listed below, and select **Save**.

- Attention: Can be used for the name of the person to alert at the shipping destination. Optional.
- Company: Required if the First Name and Last Name are not specified. Otherwise, optional.
- Prefix: An honorific, such as Ms or Dr. Optional.
- First Name: Required, along with the Last Name, if the Company is not specified. Otherwise, optional.
- Middle Name: Optional.
- Last Name: Required, along with the First Name, if the Company is not specified. Otherwise, optional.
- Suffix: For example, Esq. or Jr. Optional.
- Address Line 1 through Address Line 4: Address Line 1 is required. Additional lines are optional.
- Apt/Suite: Optional.
- City: Required.
- State/Province Code: Required.
- Country Code: Required.
- Postal Code: Optional.
- Day Phone: Optional.
- Evening Phone: Optional.



**Note:**

The window doesn't check that your entries at this window are for a valid, deliverable address.

After you apply the update, an order history record is created; however, the history record in Store Connect doesn't indicate the nature of the change.

Your entries here don't update the shipping address in the originating system. Also, although the ship-to address for a ship-for-pickup order is the store location where the customer wants to pick up the order, updating the address here does not update the location address in Order Orchestration, or in the system where the order originated.

# 12

## Ready to Pick Up

**Purpose:** Use this screen to review pickup and ship-for-pickup orders that are ready to be picked up by the customer at your store location.

**Under review?** If the order is currently under review, the option to **Begin Pick Up** is greyed out (not available).


**Which orders are displayed?** This screen displays:

- Pickup orders that are assigned to your current store location and have been picked but not yet picked up.
- Ship-for-pickup orders that have been received at your current store location but not yet picked up, as well as ship-for-pickup orders that were assigned to your current store location for sourcing and were picked, but not yet picked up.

If there are more than 100 orders that are ready for pickup, the first 100 orders are displayed based on the dates when they were created, and a message indicates that there are additional orders. You can use the [Search Options](#) to restrict the displayed orders.

If you advance to a different screen and then return to this screen, the list of orders is refreshed: any newly picked or received orders are added, and orders that have been picked up, rejected, or canceled are removed.

**Selecting an order for pickup:** Highlight an order and select **Begin Pick Up** to advance to the [Pick Up Order](#) screen.

**How to display this screen:** Select **Ready to Pick Up** ()

**Fields at this screen:**

- [Order ID](#), followed by an indicator if the order is [Under Review](#)
- [Date and Time](#)
- [Customer](#)
- [Request ID](#)






 **Note:**

The date and time, order ID, customer, and request ID are listed under *Date and Details* when you are using a small screen, such as a mobile device or phone.




- [Fulfillment Type](#)
- [Lines](#): The number of lines that are ready to pick up. This total might include order lines that were sourced at different locations, including your current store location.

**More information:** See [Store Connect Overview](#) for background on processing pickup or ship-for-pickup orders in Store Connect.

## Options at this screen:

| Option   | Procedure  |
|--|--|
| <b>Search for an order or limit the results to certain orders</b>  | Use the <a href="#">Search Options</a> , available by clicking the magnifying glass icon (  ) or putting the cursor in the <a href="#">Search Criteria</a> field.  |
| <b>Select an order to begin the pick up process</b>  | Select an order and click <b>Begin Pick Up</b> to advance to the <a href="#">Pick Up Order</a> screen.<br><b>Error message?</b> A message indicates if the status of the order selected for pickup has changed since the screen displayed the list of orders, and the order is no longer eligible for pickup.  |
| <b>Change the pickup date for an order</b>   | Select an order and select <b>Change Order Pick Up Date</b> from More Options (  ) at the bottom right to open the <a href="#">Change Order Pick Up Date</a> window. This option is available only if your organization is configured to automatically cancel unclaimed pickup or ship-for-pickup orders after a specified number of days. Also, an error message indicates if the status of the order has changed since you displayed the current screen.              |
| <b>Select an order to view it and optionally update it (begin pickup, view packing documents, view order history, cancel, or reject)</b> | Select an order and click <b>View</b> to advance to the <a href="#">View Order</a> screen.   |
| <b>Select an order to view or print the pack slip</b>  | Select an order and select <b>View Packing Documents</b> from <a href="#">More Options</a> (  ) to display and optionally print the <a href="#">Packing Slip</a> .  |
| <b>Select an order to view order history</b>   | Select an order and click <b>View Order History</b> from <a href="#">More Options</a> (  ) to advance to the <a href="#">Order History</a> screen.  |
| <b>Cancel an entire order</b>  | <b>Cancel order?</b> You might cancel an order if the customer has indicated that they don't want the order. Order Orchestration does not attempt to find another location for the order.<br><b>How to cancel:</b> Select an order and select <b>Cancel Order</b> from <a href="#">More Options</a> (  ). The <a href="#">Cancel Order</a> window opens.<br>A message indicates if the status of the order has changed since the screen displayed the list of orders. |



| Option                        | Procedure  |
|-------------------------------|--|
| <b>Reject an entire order</b> | <p><b>Reject order?</b> You might reject any order if you don't have the stock available to fulfill it.</p> <p><b>How to reject:</b> Select an order and select <b>Reject Order</b> from <i>More Options</i> (). The <i>Reject Order</i> window opens. A message indicates if the status of the order has changed since the screen displayed the list of orders.</p> <p><b>What happens when you reject:</b></p> <ul style="list-style-type: none"> <li>• Pickup order:<br/>The order is updated as unfulfillable, and is no longer displayed at the Ready to Pick Up screen.</li> <li>• Ship-for-pickup order:<br/>A new sourcing location is assigned for the order, and the screen closes. If there isn't another location that can source the order, the order's status is updated to unfulfillable.</li> </ul> |
| <b>Additional tasks</b>       | <p>Select the <i>Tasks</i> icon () to open a drawer on the left that displays a list of options. See <i>Tasks</i>.</p> <p>These options are also available by opening the <i>Menu</i> option ().</p>  |


# 13






## Pick Up Order




**Purpose:** Use this screen to confirm pickup of a ship-for-pickup or pickup order at your current store location.

**Available when?** This screen is available by selecting **Begin Pick Up** in the bottom right at the [Ready to Pick Up](#) screen, the [View Order](#) screen, or the [View Full Order](#) screen if a pickup order for your current store location has been picked, or a ship-for-pickup order has been received (or picked, if it's sourced at your current location), and not yet been picked up, and is not currently [Under Review](#).

### Options at this screen

| Option                                    | Procedure  |
|---|--|
| <b>confirm pickup of the entire order</b> | <p>Select <b>Complete Pickup</b> to confirm that the customer has picked up all items on the order.</p> <p><b>Packing slip needed?</b> Depending on the configuration for your organization, the <a href="#">Packing Slip</a> might not be generated automatically when you confirm pickup. If you need to print the packing slip, select <a href="#">View Packing Documents</a>, as described below, before selecting <a href="#">Complete Pickup</a>.</p> <p>An error message indicates if the status of the order has changed since you displayed the current screen. Otherwise, you return to the previous screen and the order is no longer displayed at the <a href="#">Ready to Pick Up</a> screen.</p> |
| <b>change the order pickup date</b>       | <p>Select <b>Change Order Pick Up Date</b> from More Options () at the bottom right to open the <a href="#">Change Order Pick Up Date</a> window.</p> <p>This option is available only if your organization is configured to automatically cancel unclaimed pickup or ship-for-pickup orders after a specified number of days. Also, an error message indicates if the status of the order has changed since you displayed the current screen.</p>  |

| Option                            | Procedure   |
|-----------------------------------|---|
| <b>change to a partial pickup</b> | <p>The option to confirm a partial pickup is available only if your organization supports it.</p> <p>Select <b>Change to Partial Pickup</b> from More Options (  ) at the bottom right if, for example, the customer is not prepared to pick up all items on the order, but does not want to cancel the items, and plans to pick up the remaining items at a later time.</p> <p>The option to lower the picked quantity of each item is available. For example, if the Picked quantity of an item is currently 2, you can use the down arrow next to the quantity to change the quantity to 1 if the customer does not want a second unit of the item at this time, or you can change the quantity to 0 if the customer does not want the item at all at this time.</p> <p>If you have lowered the quantity of an order line and need to change it back, you can use the up arrow next to the quantity to increase it.</p> <p>Select <b>Complete Pickup</b>, as described above under confirming pickup of the entire order, to confirm the pickup of the currently displayed quantities of the items on the order. Any remaining order line quantities remain open. An error message indicates if the status of the order has changed since you displayed the current screen.</p> |
| <b>revert to full pickup</b>      | <p>If you have selected <b>Change to Partial Pickup</b> from More Options (  ) at the bottom right and then need to revert to picking up the full order, select <b>Revert to Full Pickup</b> from More Options (  ). If you have lowered the order line quantities for any items, they revert to the original quantities that were displayed when you first opened the screen. You can now complete pickup of the entire order, or use the other options available at the screen.</p> <p>This option is available only after you have selected Change to Partial Pickup.</p>  |
| <b>view the packing slip</b>      | <p>Select <b>View Packing Documents</b> from More Options (  ) at the bottom right to view and optionally print the <a href="#">Packing Slip</a>.</p>  |
| <b>cancel the entire order</b>    | <p>Select <b>Cancel Order</b> from More Options (  ) at the bottom right to cancel the entire order. The <a href="#">Cancel Order</a> window opens.</p> <p>You might cancel an order if the customer has indicated that they don't want the order. Order Orchestration does not attempt to find another location for the order. The order is no longer displayed at the Ready to Pick Up screen.</p>   |

| Option                               | Procedure   |
|--------------------------------------|---|
| <b>reject the entire order</b>       | <p>Select <b>Reject Order</b> from More Options (  ) at the bottom right to reject the entire order. The <i>Reject Order</i> window opens. You might reject any order if you don't have the stock available to fulfill it.</p> <p><b>What happens when you reject:</b></p> <ul style="list-style-type: none"> <li>• Pickup order:<br/>The order is updated as unfulfillable, and is no longer displayed at the Ready to Pick Up screen.</li> <li>• Ship-for-pickup order:<br/>A new sourcing location is assigned for the order, and the screen closes. If there isn't another location that can source the order, the order's status is updated to unfulfillable.</li> </ul>  |
| <b>cancel an item</b>                | <p>Select <b>Cancel Item</b> from More Options (  ) to the right of the item to cancel the item on the order. This option is available only if your organization supports updates to individual order lines. The <i>Cancel Item</i> window opens. You might cancel an item if the customer indicates that they don't want the item. Order Orchestration does not attempt to find another location for the item. The item is no longer displayed on the Pick Up Order screen.</p>   |
| <b>reject an item</b>                | <p>Select <b>Reject Item</b> from More Options (  ) to the right of the item to reject the item on the order. This option is available only if your organization supports updates to individual order lines. The <i>Reject Item</i> window opens. At this window, you can reject all units of the order line, or a partial quantity if your organization supports it. You might reject an item if you don't actually have the stock available to fulfill it.</p> <p><b>What happens when you reject:</b></p> <ul style="list-style-type: none"> <li>• Pickup order:<br/>The item is updated as unfulfillable, and is no longer displayed at the Ready to Pick Up screen.</li> <li>• Ship-for-pickup order:<br/>A new sourcing location is assigned for the item, and it is no longer displayed at the Pick Up Order screen. If there isn't another location that can source the item, the item's status is updated to unfulfillable.</li> </ul> |
| <b>return to the previous screen</b> | Select <b>X</b> from the top right to return to the previous screen.  |

#### Fields at this screen

| Fields                 | Description   |
|------------------------|---|
| <b>Order number</b>    | The number or code identifying the order in the originating system. |
| <b>Next action</b>     | The next action indicated is <i>Ready to Pick Up</i> .              |
| <b>Number of units</b> | The current number of picked units on the order.                    |

| Fields                    | Description   |
|---------------------------|---|
| <b>Fulfillment Type</b>   | A fulfillment type of Pickup or Ship for Pickup is indicated to the right.  |
| <b>Items:</b>             | For each item on the order that is assigned to your current store location and ready to be picked up, the following information is displayed.   |
| <b>Item description</b>   | A description of the item.<br>An image of the item may also be displayed.   |
| <b>Item code</b>          | A code identifying the item.  |
| <b>Price</b>              | The price of a single unit of the item.   |
| <b>Available Quantity</b> | The available quantity of the item after subtracting the quantity on any open orders.   |
| <b>Picked</b>             | The current quantity of the order line that has been picked or received and not yet picked up.  |
| <b>Order Details:</b>     | Information about the customer and the placed location are displayed.   |
| <b>Sold To</b>            | The customer who placed the order. Can include: <ul style="list-style-type: none"> <li>• Company name</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> <p>If the address has been updated in the originating system since the order was originally created, it isn't automatically updated here.</p>   |
| <b>Location Detail</b>    | Includes the location code and description for each of the following: <ul style="list-style-type: none"> <li>• <i>Placed at:</i> The location where the order was placed. May represent another store location, the contact center, or the web storefront.</li> <li>• <i>Sourced from:</i> For a ship-for-pickup order, this is the location that shipped the items, if they were not available in your current location. <b>Multiple locations</b> is indicated if the items were shipped from more than one location. This is your current location if your location if it was not necessary for the items to be shipped from a different location.<br/><b>Note:</b> The <i>Sourced From</i> information is not relevant to or included for a pickup order.</li> <li>• <i>Pick Up at:</i> Your current location.</li> </ul> |

# 14

## All Orders


**Purpose:** Use this screen to review all orders across your organization, regardless of status or whether they are assigned to your current store location. You might use this screen to check the status of another order for the customer even if it is not assigned to another store location or is being fulfilled through the distribution center, or an order that is not currently open.

**How to display this screen:** Select **All Orders** from the Tasks list, or the All Orders icon ()

 **Note:**

When you first advance to this screen, no orders are displayed. You need to use the [Search Options](#) to display orders that match your search criteria.

**Fields at this screen:**

- [Order ID](#), preceded by the icon () indicating if the carrier on the order is flagged as an express shipper, and followed by an indicator if the order is [Under Review](#)
- [Date and Time](#), with a red triangle indicating if the order hasn't been processed (picked for a pickup order; in transit for a ship-for-pickup order; or picked for a ship-for-pickup order sourced at the pickup location) within the number of hours defined by your system administrator
- [Customer](#)
- [Request ID](#)
- [Fulfillment Type](#)

 **Note:**

The date and time, order ID, customer, and request ID are listed under *Date and Details* when you are using a small screen, such as a mobile device or phone.





- [Lines](#): At this screen, the total number of lines includes closed lines (picked up, shipped, canceled, or unfulfillable). Note that when you search, the total number of lines includes only those that match your search criteria.

 **Note:**

The total number of order lines can include order lines assigned to different locations for fulfillment.

**More information:** See [Store Connect Overview](#) for background on processing delivery or pickup orders in Store Connect.

**Options at this screen:**

| Option  | Procedure  |
|---|--|
| <b>Display orders, or restrict the search results to certain orders</b> | Use the <a href="#">Search Options</a> , available by clicking the magnifying glass icon (  ) or putting the cursor in the <a href="#">Search Criteria</a> field.  |
| <b>Select an order to view or work with it</b>                          | Select an order and click <b>View</b> to advance to the <a href="#">View Full Order</a> screen. From this screen, you can perform the next step in fulfilling the order, for example, accepting the order if it is new, or begin picking if it has been accepted, provided the order is assigned to your current store location and not prohibited from shipment or pickup if the order is under review. |
| <b>Select an order to view order history</b>                            | Select an order and select <b>View Order History</b> from More Options (  ) to advance to the <a href="#">Order History</a> screen.   |
| <b>Additional tasks</b>   | Select the <a href="#">Tasks</a> icon (  ) to open a drawer on the left that displays a list of options. See <a href="#">Tasks</a> .<br>These options are also available by opening the <a href="#">Menu</a> option (  ).             |

# 15

## View Full Order


**Purpose:** Use this screen to view an order, regardless of the current status of the order lines, or whether it is assigned to your current store location, and optionally:

- Cancel or reject one or more order lines assigned to your current store location
- Perform the next step in processing the order if any order lines are assigned to your current store location
- View order history

**How to display:** This screen is available by highlighting the order at the [All Orders](#) screen and selecting **View** in the bottom right.

**Options at this screen**



| Option   | Procedure  |
|--|--|
| <b>perform the next step in processing the order</b> | <p>Depending on the order's current status, the next processing step for an order that has any open order lines assigned to your current store location is available by selecting the option at the lower right:</p> <ul style="list-style-type: none"> <li>• <b>Accept:</b> Accept a new order for processing, if it's assigned to your current store location. In the case of a ship-for-pickup order, you can accept the order if it's assigned to your current location for sourcing.</li> <li>• <b>Begin Picking:</b> Begin picking an accepted new order, if it's assigned to your current store location. You advance to the <i>Pick Order</i> screen. In the case of a ship-for-pickup order, you can begin picking the order if it's assigned to your current location for sourcing.</li> <li>• <b>Begin Shipping:</b><br/>Begin shipping a picked delivery order or ship-for-pickup order, if it's assigned to your current store location. You advance to the <i>Ship Order</i> (or <i>Ship Order Manually</i>) screen. However, if a delivery order is <i>Under Review</i>, this option is not available. In the case of a ship-for-pickup order, you can begin shipping the order if it's assigned to your current location for sourcing and is not under review.</li> <li>• <b>Begin Receiving:</b> Begin receiving a ship-for-pickup order in transit to your current location. You advance to the <i>Receive Order</i> screen.</li> <li>• <b>Begin Pick Up:</b> Begin pickup of a picked pickup order or a received ship-for-pickup order (including ship-for-pickup orders assigned to your current location for both sourcing and pickup). You advance to the <i>Pick Up Order</i> screen. However, if the order is <i>Under Review</i>, this option is not available.</li> </ul> <p>Provided the order is assigned to your current store location for the next processing step, the appropriate option is available at the lower right of the screen. Otherwise, if no processing step is available, you can click <b>Done</b> at the lower right to exit the screen.</p> |
| <b>view order history</b>                            | <p>Select <b>View Order History</b> from More Options () at the bottom right to advance to the <i>Order History</i> screen.</p>   |

| Option                       | Procedure  |
|------------------------------|--|
| <p><b>cancel an item</b></p> | <p>Select <b>Cancel Item</b> from More Options ( <b>***</b> ) to the right of the item to cancel the item on the order. The <i>Cancel Item</i> window opens. This option is available for a delivery or pickup order only if the order line is assigned to your current store location and the order line is open (new, accepted, intransit, received, or picked), and only if your organization supports updates to individual order lines.</p> <p>In the case of a ship-for-pickup order, the option to cancel an order line is available only:</p> <ul style="list-style-type: none"> <li>• If you are at the sourcing location (but not also the pickup location), when the order line is new, accepted, or picked.</li> <li>• If you are at the pickup location, only when the order line is received.</li> </ul> <p>You might cancel an item if the customer has indicated that they don't want the item. Order Orchestration does not attempt to find another location for the item.</p> <p>If the item is no longer eligible to be canceled, a message indicates if the status of the order line has changed since you advanced to the screen.</p>   |
| <p><b>reject an item</b></p> | <p>Select <b>Reject Item</b> from More Options ( <b>***</b> ) to the right of the item to reject the item on the order. <i>Reject Item</i> window opens. This option is available for a delivery or pickup order only if the order line is assigned to your current store location and the order line is open (new, accepted, intransit, received, or picked), and only if your organization supports updates to individual order lines.</p> <p>In the case of a ship-for-pickup order, the option to reject an order line is available only:</p> <ul style="list-style-type: none"> <li>• If you are at the sourcing location (but not also the pickup location), when the order line is new, accepted, or picked.</li> <li>• If you are at the pickup location, only when the order line is in transit or received.</li> </ul> <p>You might reject an item if you don't have the stock available to fulfill it.</p> <p><b>What happens when you reject:</b></p> <ul style="list-style-type: none"> <li>• Delivery order, or a ship-for-pickup order that your current location is assigned to ship to the pickup location: Order Orchestration sees if there is another location that can fulfill or source the item.</li> <li>• Pickup order: The customer is notified that the item is not available for pickup and the order status is set to unfulfillable.</li> <li>• Ship-for-pickup order that the customer wants to pick up in your current location: A new sourcing location is assigned for the item. If there isn't another location that can source the item, the item's status is updated to unfulfillable.</li> </ul> <p>If the item is no longer eligible to be rejected, a message indicates if the status of the order line has changed since you advanced to the screen.</p> |

---

| Option                               | Procedure  |
|--------------------------------------|--|
| <b>return to the previous screen</b> | Select <b>Done</b> from the bottom right to return to the previous screen. |


---

**Fields at this screen**

---

| Fields              | Description  |
|---------------------|--|
| <b>Order number</b> | The number or code identifying the order in the originating system. If the order is <a href="#">Under Review</a> , this is indicated to the right. |

---

| Fields                                      | Description  |
|---|--|
| <b>Status</b>                               | <p>Possible order statuses are:</p> <ul style="list-style-type: none"> <li>• <i>Accepted</i>: The order has been accepted at the assigned location.</li> <li>• <i>Canceled</i>: All lines on the order have been canceled.</li> <li>• <i>Complete</i>: At least one order line has been fulfilled, at least one order line has been canceled or rejected (and its status changed to unfulfillable), and there are no remaining open order lines.</li> <li>• <i>Fulfilled</i>: The delivery order has been shipped, or the pickup or ship-for-pickup order has been picked up.</li> <li>• <i>Intransit</i>: The items on a ship-for-pickup order have been shipped from the sourcing location, and the next step is receipt at the pickup location.</li> <li>• <i>New Order</i>: The order has just been received from the originating system, created in Order Orchestration, and assigned to a location for fulfillment.</li> <li>• <i>Open</i>: One or more order lines have been fulfilled, canceled, or unfulfillable, but one or more remain open (polled, accepted, intransit, picked, or received).</li> <li>• <i>Picked</i>: The delivery order has been picked and is ready for shipment to the customer, the ship-for-pickup order has been picked and is ready for shipment to the pickup location, or the pickup order has been picked and is ready for pickup. However, the line can still be in picked status even if it is under review and can't yet be fulfilled.</li> <li>• <i>Received</i>: The ship-for-pickup order has been received at the pickup location or sourced at the pickup location and is ready for pickup, provided it is not under review. If a ship-for-pickup order is sourced at the same location where the customer picks it up, its status is automatically set to <i>Received</i>.</li> <li>• <i>Unfulfillable</i>: The order has been rejected from the assigned fulfilling location and can't be assigned to a different location for fulfillment. Pickup orders can't be reassigned. An order can also be in unfulfillable status if one or more order lines have been rejected and can't be reassigned, one or more order lines have been canceled, and there are no other order lines.</li> </ul> |
| <b>Number of units<br/>Fulfillment Type</b> | <p>The number of units on the order.</p> <p>A fulfillment type of Delivery, Pickup, or Ship for Pickup is indicated to the right. The express icon (  ) is to the right of the fulfillment type for a delivery order if the carrier on the order is flagged as an express shipper.</p>  |

| Fields | Description |
|--------|-------------|
|--------|-------------|

**Items:** For each item on the order, the following information is displayed. Items that are assigned to your current store location, if any, are listed first.

 **Note:**

Items that are fulfilled through the warehouse and not submitted to Order Orchestration are not displayed. Also, note that, since this screen displays closed lines (picked up, shipped, canceled, or unfulfillable), the number of lines displayed here may be higher than on the number of matching lines on the *All Orders* screen that match your search criteria.

|                            |  |
|----------------------------|--|
| <b>Item description</b>    | A description of the item.   |
|                            | An image of the item may also be displayed.  |
| <b>Item code</b>           | A code identifying the item.   |
| <b>Price</b>               | The price of a single unit of the item.  |
| <b>Fulfilling Location</b> | The code and description of the store location where the item is assigned for fulfillment. |
| <b>Order Line Quantity</b> | The quantity of the order line.  |

| Fields                   | Description   |
|--------------------------|---|
| <b>Order Line Status</b> | <p>The current status of the order line. Possible order line statuses are:</p> <ul style="list-style-type: none"> <li>• <i>Accepted</i>: The order line has been accepted at the assigned location.</li> <li>• <i>Canceled</i>: The order line has been canceled.</li> <li>• <i>Fulfilled</i>: The delivery order line has been shipped, or the pickup or ship-for-pickup order line has been picked up.</li> <li>• <i>Intransit</i>: The item on a ship-for-pickup order has been shipped from the sourcing location to the pickup location.</li> <li>• <i>Picked</i>: <ul style="list-style-type: none"> <li>– The delivery order line has been picked and is ready for shipment.</li> <li>– The ship-for-pickup order line has been picked at the sourcing location and is ready for shipment to the pickup location.</li> <li>– The pickup order line has been picked and is ready for pickup.</li> </ul> </li> </ul> <p>However, the line can still be in picked status even if it is under review and can't yet be fulfilled.</p> <ul style="list-style-type: none"> <li>• <i>Polled</i>: The order has just been received from the originating system, created in Order Orchestration, and assigned to a location for fulfillment, but not yet accepted.</li> <li>• <i>Received</i>: <ul style="list-style-type: none"> <li>– The ship-for-pickup order line has been received at the pickup location and is ready for pickup.</li> <li>– The ship-for-pickup order line has been picked, if it is being sourced from the pickup location, rather than being shipped from a separate sourcing location.</li> </ul> </li> </ul> <p>Received order lines are displayed as Picked at the <i>View Order</i> screen.</p> <ul style="list-style-type: none"> <li>• <i>Rejected</i>: The order line has been rejected by the assigned fulfilling location. After a rejection, Order Orchestration either reassigns the order line or changes its status to Unfulfillable. Pickup orders aren't reassigned.</li> <li>• <i>Unfulfillable</i>: The order can't be fulfilled through Order Orchestration. This might occur if, for example, there are no locations that stock the item, or the assigned pickup location rejects the order.</li> </ul> |


**Order Details:** Information about the customer and the placed, sourcing, and pickup locations are displayed.


| Fields                 | Description   |
|------------------------|---|
| <b>Sold To</b>         | <p>The customer who placed the order. Can include:</p> <ul style="list-style-type: none"> <li>• Company name</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> <p>If the address has been updated in the originating system since the order was originally created, it isn't automatically updated here.</p>  |
| <b>Ship To</b>         | <p>The shipping address for a delivery order, if a separate shipping address was specified. Not displayed for a pickup or ship-for-pickup order. Can include:</p> <ul style="list-style-type: none"> <li>• Company name</li> <li>• Attention line, if any</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> <p>If the address has been updated in the originating system since the order was originally created, it isn't automatically updated here.</p>                     |
| <b>Location Detail</b> | <p>Includes the location code and description for each of the following:</p> <ul style="list-style-type: none"> <li>• <i>Placed at</i>: The location where the order was placed. May represent another store location, the contact center, or the web storefront.</li> <li>• <i>Sourced from</i>: The location providing the inventory for the delivery or ship-for-pickup order. If there are multiple sourcing locations, they aren't listed; instead, <i>Multiple Locations</i> is indicated. You can review the individual items, above, to check the sourcing locations for each. The <i>Sourced from</i> location is not included for a pickup order.</li> <li>• <i>Pick Up at</i>: The location where the customer picks up the order. The <i>Pick Up at</i> location is not included for a delivery order.</li> </ul> |

# 16

## Order History

**Purpose:** Use this screen to review the history of all status updates that have taken place for the items on the order. History is listed in chronological order (oldest to newest).

**How to display:** Select **View Order History** from More Options (  ) from all screens except the *Pick Order*, *Ship Order* (or *Ship Order Manually*), *Receive Order*, or *Pick Up Order* screens.

| Fields              | Description  |
|---------------------|--|
| <b>Order Number</b> | A code assigned to identify the order in the originating system.<br><b>Note:</b> Two orders can be assigned the same order ID if, for example, the customer added a new item to an existing order.   |
| <b>Order Type</b>   | An order type of Pickup or Delivery is indicated at the upper right. For a delivery order, an icon (  ) indicates if the carrier on the order is flagged as an express shipper. |

**For each item on the order:**

 **Note:**

Items that are fulfilled through the warehouse and not submitted to Order Orchestration for fulfillment assignment are not displayed.

|                         |   |
|-------------------------|---|
| <b>Item description</b> | A brief description of the item.  |
| <b>Item code</b>        | A code to identify the item. Preceded by the word “Item.”   |
| <b>Item image</b>       |   |
| <b>Line number</b>      | The number identifying the order line in Order Orchestration and Store Connect. May be different from the line number on the order in the originating system. |

**For each update for an item:**

 **Note:**

A history record is also created when you change the order pickup date for a pickup or ship-for-pickup order or when you update the ship-to address for a delivery order; however, the same information is displayed for each order line before and after the pickup date change.

|                      |  |
|----------------------|--|
| <b>Date and time</b> | The date and time when the status change took place. |
|----------------------|--|



---

| Fields      | Description  |
|-------------|--|
| <b>User</b> | <p data-bbox="781 275 1451 331">Identifies the user who performed the action that caused the status change:</p> <ul data-bbox="781 338 1451 690" style="list-style-type: none"><li data-bbox="781 338 1451 422">• If the action was performed in Store Connect, this is the name of the Store Associate who performed the action.</li><li data-bbox="781 428 1451 485">• If the action was performed in Order Orchestration, this is the user who performed the action.</li><li data-bbox="781 491 1451 600">• If Order Orchestration applied the change automatically, such as setting the status to POLLED when the order becomes available for processing in Store Connect, set to SYSTEM.</li><li data-bbox="781 606 1451 690">• If an integrating system submitted the order to Order Orchestration, this is a code to identify the integrating system.</li></ul> |


| Fields        | Description   |
|---------------|---|
| <b>Status</b> | <p>The status that was applied to the order line. Possible statuses displayed at this screen are:</p> <ul style="list-style-type: none"> <li>• <i>Accepted</i>: The order line has been accepted for fulfillment at the assigned location.</li> <li>• <i>Canceled</i>: The order line has been canceled.</li> <li>• <i>Fulfilled</i>: The order line has been shipped (delivery order) or picked up by the customer (pickup order or ship-for-pickup order).</li> <li>• <i>Intransit</i>: The order line on a ship-to-store order has been shipped from the sourcing location. The tracking number, if any, is indicated.</li> <li>• <i>Intransit Polled</i>: An additional order status change is listed when an order line on a ship-for-pickup order has been shipped from the sourcing location. This entry normally has the same date and time as the <i>Intransit</i> entry.</li> <li>• <i>New Order</i>: The order line has just been received from the originating system and created in Order Orchestration. The line should stay in this status very briefly. However, if an existing order line is rejected and reassigned to a different location for fulfillment, it may remain in New Order status briefly before its status changes to Polled.</li> </ul> <p>Depending on the configuration of your organization, there might be an initial status entry of New Order assigned to an IN PROCESS location, followed by a status entry of New Order assigned to an actual location for fulfillment or sourcing.</p> <ul style="list-style-type: none"> <li>• <i>Picked</i>: The order line has been picked, indicating: <ul style="list-style-type: none"> <li>– The delivery order line has been picked and is ready for shipment</li> <li>– The ship-for-pickup order line has been picked at the sourcing location and is ready for shipment to the pickup location</li> <li>– The pickup order line has been picked and is ready for pickup</li> </ul> </li> <li>• <i>Polled</i>: The order has been made available for processing in Store Connect. The line should go into Polled status very soon after the order is created in Order Orchestration and assigned to a Store Connect location. However, if an existing order line is rejected and reassigned to a different location for fulfillment, it may remain in New Order status briefly before its status changes to Polled.</li> <li>• <i>Received</i>: The order line on a ship-for-pickup order has been received at the pickup location from the sourcing location; or, if the pickup location and the sourcing location are the same, the order line has been picked. The order line is then ready for pickup, provided the order is not <a href="#">Under Review</a>.</li> <li>• <i>Rejected</i>: The order line has been rejected by the assigned fulfilling location. After a rejection, Order Orchestration either reassigns the order line or changes its status to Unfulfillable. Pickup orders aren't reassigned.</li> </ul> |

| Fields          | Description   |
|-----------------|---|
|                 | <ul style="list-style-type: none"> <li>• <i>Unfulfillable</i>: The order line can't be fulfilled through Order Orchestration. This might occur if, for example, there are no locations that stock the item, or the assigned pickup location rejects the order.</li> </ul> <p>Note that some of the statuses displayed on other screens differ from those displayed here.</p> <p><b>Multiple entries with same status?</b> There might be multiple entries with the same status but different times or dates if, for example, the order was flagged or unflagged as <a href="#">Under Review</a>, or if the shipping address for the order was updated.</p> <p><b>Partial updates:</b> A status might have been applied to a partial quantity of an order line if, for example, you were picking an order line with a quantity of 2 and found that there was only 1 in stock. In that case, you might reject 1 unit and pick 1 unit. Order Orchestration might then reassign the rejected unit on a delivery order to another location for fulfillment, or the rejected unit might go into Unfulfillable status.</p> |
| Store           | <p>The code identifying the store where the status update took place, followed by the description.</p> <p>Ship-for-pickup statuses:</p> <ul style="list-style-type: none"> <li>• When a ship-for-pickup order is shipped from the sourcing location, the sourcing location is indicated for the <i>Intransit</i> and <i>Intransit Polled</i> history records.</li> <li>• When a ship-for-pickup order is received at the pickup location, the pickup location is indicated for the <i>Received</i> history records. If the pickup location receives a partial quantity, splitting the order line, the pickup location is listed for the received quantity and the quantity that is still in transit.</li> </ul>   |
| Tracking Number | <p>The number used to track a shipment for a delivery order or the shipment of a ship-for-pickup order from the sourcing location. The code identifying the carrier is displayed to the right in parentheses. If a description of the carrier is defined in Order Orchestration, the description is also displayed.</p>   |
| Reason          | <p>Indicate the description of the reason why an order line was canceled or rejected.</p>   |
| Number of units | <p>The number of units affected by the status change. This field is to the right.</p>   |

# 17

## Pack Slip

**Purpose:** The contents of the pack slip are described below.

**How to generate:** Select **View Packing Documents** from More Options () at the bottom right at the Pick Order, Ship Order, Pick Up Order, Ready to Pick, Ready to Ship, and Ready to Pick Up screens. This option is also available from the View Order screen when the order has already been accepted; it's not available when you select View Order from the New Orders screen.

**Generated automatically?** Depending on the configuration for your organization or store location, the packing slip is generated automatically when you accept, pick, ship, receive, or pick up an order.

**Use barcode for scanning order at receiving?** If you receive a pack slip for a ship-for-pickup order, you can scan the barcode on the pack slip at the [Ready to Receive](#) screen to advance to the Receive Order screen, where you can confirm receipt of the order.

**Window width:** In Chrome, the pack slip is displayed in a window 800 pixels wide.

| Fields              | Description  |
|---------------------|--|
| <b>Order Number</b> | The originating order number is an unlabeled field at the top right, below a barcode.  |
| <b>Ship To:</b>     | <p>The name and address of the customer receiving the shipment. Includes the:</p> <ul style="list-style-type: none"><li>• company name, if any</li><li>• first, middle, and last name, if any</li><li>• first two address lines</li><li>• apartment or suite number</li><li>• city, state, postal code, and country code</li><li>• attention line, if any</li></ul> <p>For a delivery order, this is the customer's name and shipping address.</p> <p>For a ship-for-pickup order, this is the name and address of the pickup location, as submitted by the system where the order originated.</p> <p>If the name and address were edited at the <a href="#">Edit Ship To Details</a> window, the updated information prints here.</p> |
| <b>Sold To:</b>     | <p>The name and address of the sold-to customer. Includes the:</p> <ul style="list-style-type: none"><li>• company name, if any</li><li>• first, middle, and last name, if any</li><li>• first two address lines</li><li>• apartment or suite number</li><li>• city, state, postal code, and country code</li></ul>  |
| <b>Order Type</b>   | Either Delivery Order, Pickup Order, or Ship For Pickup Order.   |
| <b>Printed Date</b> | The date when the packing slip was printed.  |

| Fields   | Description   |
|--|---|
| <b>Order Date</b>  | The date when the order was created in Order Orchestration.   |
| <b>Order Number</b>  | The originating order number.   |
| <b>Carrier</b>   | The carrier assigned to ship the order. Included only for a delivery order.   |
| <b>Pack Slip Message (unlabeled field below the customer number)</b> | The pack slip message, if any. Can be multiple lines of text. Up to four total lines of order message and gift message text can be displayed, or up to 255 positions (characters and spaces). Your system administrator can define a pack slip message for delivery orders, and a different pack slip message for pickup or ship-for-pickup orders. |
| <b>Gift message (unlabeled field below the order message)</b>        | The gift message, if any. Can be multiple lines of text.  |

 **Note:**

If there is both an order message and a gift message, the first line of the gift message starts on the last line of the order message.

**Express Shipping**

Displayed if the carrier assigned to the delivery or ship-for-pickup order is flagged as an express shipper.

**For each order line on the pack slip:**
 **Note:**

When the pack slip is generated at receiving, it lists the lines on the order that have been received (but not yet picked up) at your current location, either previously or in your current session. If any items on the order didn't need to be received because they are available at your current location, and have been picked, these items are listed as well. If an order line was split (for example, assigned to two different sourcing locations because no single location had a sufficient quantity to source), then there is a separate line on the pack slip for each partial quantity of the order line.

|                    |                                |
|--------------------|--------------------------------|
| <b>Item</b>        | The code identifying the item. |
| <b>Description</b> | The description of the item.   |


| Fields  | Description  |
|---|--|
| <b>Ship</b>                                       | <p>The quantity of the item to ship. <b>Note:</b></p> <ul style="list-style-type: none"> <li>• If you initiate a partial pickup or a partial ship (reducing the quantities) and then view the pack slip, the pack slip reflects the old quantities because you haven't committed the change.</li> <li>• If you cancel or reject a quantity when picking, picking up, or shipping, the pack slip reflects the quantities after the cancel or reject, because cancelling or rejecting takes effect immediately.</li> <li>• When you use the X to close an action screen such as the Ship Order, Pick Order, or Pickup Order, if you performed a reject or cancel, that action has already taken place. As a result, closing the page with X just prevents the picking or shipping update, but the cancel / reject happens immediately after you enter the reason code and click OK.</li> </ul> |
| <b>Price</b>                                      | The unit price for the item. Not printed if the order is flagged as a gift.  |
| <b>Ext. Price</b>                                 | The customer's extended price for the item (quantity * unit price).  |
| <b>Information for the item may also include:</b> |  |
| <b>Customization</b>                              | <p>This label indicates that the following lines are the customization instructions for the item, including:</p> <ul style="list-style-type: none"> <li>• a code identifying the type of customization, such as monogramming, ink color, or script</li> <li>• the customization instructions themselves</li> </ul> <p>The total handling charges for the item are listed in the <i>Extension</i> column; however, no prices print if the order is flagged as a gift.</p>   |
| <b>Return Address</b>                             | The return address for the organization. Not included for a ship-for-pickup order.   |

# 18

## Cancel Order

**Purpose:** Use this window to cancel an entire order.

You might cancel an order if the customer has indicated that they don't want it. Order Orchestration does not attempt to find another location for the order.

**How to display:** This window opens when you select the **Cancel Order** option from More Options (  ). The option to cancel an order is available at the bottom right of most screens, with the exception of the [All Orders](#) screen and the [View Full Order](#) screen.

**Cancel reason:** Select the reason why you are canceling the order from the drop-down list if more than one cancel reason is defined for your organization.

**Applying the cancellation:** After you select OK, the canceled order is removed from the screen. If you were on a screen displaying the order, such as the *Pick Order* screen, you return to the list screen, such as the *Ready to Pick* screen, with the canceled order no longer displayed. However, if the status of any item on the order has changed since you opened the window, an error message indicates that the order can't be canceled at this time.

# 19

## Cancel Item

**Purpose:** Use this window to cancel one or more units of an item on the order if the customer does not want the full ordered quantity. This option is available only if your organization supports updates to individual order lines. Also, note that canceling a partial quantity is available only if your organization supports partial quantity updates.

You might cancel an item if the customer has indicated that they don't want the item. Order Orchestration does not attempt to find another location for the item.

**How to display:** This window opens when you select the **Cancel Item** option from the More Options ( **\*\*\*** ) to the right of the item on the [View Order](#), [Pick Order](#), [Ship Order](#), or [Pick Up Order](#) screen.

**How many units to cancel?** You can cancel the entire open quantity of the order line; or, if it's supported for your organization, you can cancel a partial quantity. For example, if the customer ordered 2 units by mistake, you can cancel one unit. Use the up and down arrows to change the cancel quantity. The full open order line quantity is selected by default.

**Cancel reason:** You need to select the *Reason* why you are canceling the item.

**Applying the cancellation:** After you select OK, the order line quantity is reduced by the cancel quantity. If the entire quantity of the order line is canceled, the item is removed from the screen.

| Fields                     | Description   |
|----------------------------|---|
| <b>Item description</b>    | A description of the item.<br>An image of the item may also be displayed.   |
| <b>Item code</b>           | A code identifying the item.  |
| <b>Cancel quantity</b>     | Use the down or up arrows to set the quantity of the item to cancel. You can't cancel a quantity that's larger than the current open quantity for the item on the order. Also, note that canceling a partial quantity is available only if your organization supports partial quantity updates. |
| <b>Uncanceled quantity</b> | The current open, uncanceled quantity is indicated, for example: 2 Items Ordered.   |
| <b>Reason</b>              | Select the reason why you are canceling the item from the drop-down list if more than one cancel reason is defined for your organization.   |



# Reject Order

**Purpose:** Use this window to reject an entire order if the order can't be fulfilled through your current store location.

You might reject an order if you don't have the stock available to fulfill it.

**What happens when you reject:**

- When you reject a delivery order, or a ship-for-pickup order that your current location is assigned to ship to the pickup location, Order Orchestration sees if there is another location that can fulfill or source the order.
- When you reject a pickup order, or a ship-for-pickup order that the customer wants to pick up from your current location, the customer is notified that the order is not available for pickup and the order status is set to unfulfillable.



**Note:**

If your organization is configured to split delivery orders, or the sourcing location for ship-for-pickup orders, across multiple store locations if necessary, any items on the order that are assigned to other store locations for fulfillment or sourcing are not affected when you reject a delivery order, or reject a ship-for-pickup for sourcing.

**How to display:** This window opens when you select the **Reject Order** option from More Options (⋮). The option to reject an order is available at the bottom right of most screens, with the exception of the [All Orders](#) screen and the [View Full Order](#) screen.

**Reject reason:** Select the reason why you are rejecting the order from the drop-down list if more than one reject reason is defined for your organization.

**Applying the rejection:** After you select OK, the rejected order is removed from the screen. If you were on a screen displaying the order, such as the *Pick Order* screen, you return to the list screen, such as the *Ready to Pick* screen, with the rejected order no longer displayed. However, if the status of any item on the order has changed since you opened the window, an error message indicates that the order can't be rejected at this time.

# 21

## Reject Item

**Purpose:** Use this window to reject one or more units of an item on the order if the item can't be fulfilled through your current store location. This option is available only if your organization supports updates to individual order lines. Also, note that rejecting a partial quantity is available only if your organization supports partial quantity updates.

You might reject an item if you don't have the stock available to fulfill it.

**What happens when you reject:**

- When you reject an item on a delivery order, or on a ship-for-pickup order that your current location is assigned to ship to the pickup location, Order Orchestration sees if there is another location that can fulfill or source the item.
- When you reject an item on a pickup order, or on a ship-for-pickup order that the customer wants to pick up from your current location, the customer is notified that the item is not available for pickup and the item status is set to unfulfillable.

**How to display:** This window opens when you select the **Reject Item** option from the More Options ( **\*\*\*** ) to the right of the item on the [View Order](#), [Pick Order](#), [Ship Order](#), or [Pick Up Order](#) screen.

**How many units to reject?** You can reject the entire open quantity of the order line, or a partial quantity, if your organization supports partial quantity updates. For example, if the order line is for two units, but you only have one unit in stock, you can reject one unit. Use the up and down arrows to change the reject quantity. The full open order line quantity is selected by default.

**Reject reason:** If more than one reject reason is defined for your organization, you need to select the *Reason* why you are rejecting the item.

**Applying the rejection:** After you select OK, the order is removed from the screen.

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| Fields                     | Description   |
|----------------------------|---|
| <b>Item description</b>    | A description of the item.<br>An image of the item may also be displayed.   |
| <b>Item code</b>           | A code identifying the item.  |
| <b>Reject quantity</b>     | Use the down or up arrows to set the quantity of the item to reject. You can't reject a quantity that's larger than the current open quantity for the item on the order. Also, note that rejecting a partial quantity is available only if your organization supports partial quantity updates. |
| <b>Unrejected quantity</b> | The current open, unrejected quantity is indicated, for example: 2 Items Ordered.   |
| <b>Reason</b>              | Select the reason why you are rejecting the item from the drop-down list if more than one reject reason is defined for your organization.   |

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## Change Order Pick Up Date

**Purpose:** Use this window to change the order pickup date for a pickup or ship-for-pickup order if the customer needs more time to pick up all or part of the order. This option is available only if your organization is configured to automatically cancel unclaimed pickup or ship-for-pickup orders after a specified number of days, and if your organization supports updates to individual lines on an order.

**What happens when you change the pickup date:** The customer receives a new pickup reminder email indicating the changed date. Also, there is a new entry at the Order History screen for each item on the order for the date when you changed the pickup date, even though the information displayed is no different from the previous entry.

**How to display:** This window opens when you select the **Change Order Pick Up Date** option from the More Options (  ) at the bottom of the [Ready to Pickup](#) screen, the [Pick Up Order](#) screen, or from the [View Order](#) screen when you displayed this screen from the [Ready to Pickup](#) screen. Again, this option is available only if your organization is configured to automatically cancel unclaimed pickup or ship-for-pickup orders after a specified number of days.

**Changing the date:** Optionally, enter a new date, or select the calendar icon to pick a new date. The new date must not be in the past. An error message indicates if the date update couldn't take place (for instance, because the status of one or more items on the order has changed).

 **Note:**

This option is available only if the *Auto Cancel Days of Unclaimed Pickup Orders* at the Order Orchestration **Preferences** screen specifies a number of days, regardless of whether this is a pickup order or a ship-for-pickup order.

# 23

## About Store Connect

**Purpose:** Use the **About Store Connect** window to identify the current version of Store Connect for troubleshooting purposes.

**How to display this window:** Select **About Store Connect** below the help icon () at the top of the screen.

All fields in this window are display-only.



| Field                    | Description  |
|--------------------------|--|
| <b>Version</b>           | The current build number for Store Connect, including the release number, patch number, and build number, for example: 21.0.0.1, where 21.0 is the release number, 0 is the patch number, and 1 is the build number. |
| <b>Application Level</b> | The current application version and build number, including the date/time stamp for the build.   |
| <b>Service Level</b>     | The current service version and build number, including the date/time stamp for the build.   |

# 24

## Tasks



Use the Tasks list to advance to a list screen for available tasks:

- *New Orders*
- *Ready to Pick*
- *Ready to Ship*
- *Ready to Receive*
- *Ready to Pick Up*
- *All Orders*

How to display: Select the Tasks icon () to display the Tasks list. When using a smaller screen such as a mobile phone, you might need to select the navigation icon () to display the Tasks.

# 25

## Glossary

| Field                      | Description   |
|----------------------------|---|
| <b>Available</b>           | The available quantity of the item after subtracting the quantity on any open orders.   |
| <b>Customer</b>            | The customer's first and last name. If there is a company, the name of the company precedes the first and last name.  |
| <b>Customer and Pickup</b> | <p>The customer's name, as described above, followed by the pickup location in the form of location code — location name (for example, 123 — Main Street Store).</p> <p>The pickup location is displayed only for ship-for-pickup orders.</p> <p><b>Note:</b> On a smaller screen, such as a phone or tablet, the pickup location is listed below the request ID.</p>   |
| <b>Date and Time</b>       | <p>The date and time when the order was received from the originating system and created in Order Orchestration. Displayed on list screens, such as the <a href="#">New Orders</a> screen.</p> <p>A red triangle (  12/7/2021 ) flags the order, and the date and time are in red type, if the order hasn't been processed within the number of hours specified for your organization. Determining when the order is flagged depends on the type of processing required for the order but not yet completed:</p> <ul style="list-style-type: none"> <li>• <i>For delivery orders, and the sourcing location for ship-for-pickup orders:</i> The order is flagged based on the date and time when the oldest line order line was created, if it is not yet shipped.</li> <li>• <i>For pickup orders, and the pickup location for ship-for-pickup orders:</i> The order is flagged based on the date and time when the oldest line was created, if it not yet picked.</li> </ul> <p>A pickup or ship-for-pickup order isn't flagged if its age exceeds the required processing time if it's ready for pickup, but the customer hasn't picked it up yet. Also, a ship-for-pickup order isn't flagged if it was shipped to the pickup location within the required processing time, but not received within that time.</p> |
| <b>Express</b>             | An icon (  ) indicates if the carrier originally assigned to the order is flagged as an express shipper.   |
| <b>Fulfillment Type</b>    | <p>Possible fulfillment types are:</p> <ul style="list-style-type: none"> <li>• <b>Delivery:</b> The order should ship to the customer.</li> <li>• <b>Pickup:</b> The customer picks up the order in a store location where the items are currently available.</li> <li>• <b>Ship for Pickup:</b> The customer indicates the store location where they want to pick up the order, and the items are shipped to that location, if necessary. Once the pick up location receives the items, the customer can pick up the order.</li> </ul> <p>See the <a href="#">Store Connect Overview</a> for background.</p>  |

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| <b>Field</b>               | <b>Description</b>   |
|----------------------------|--|
| <b>Item</b>                | The code identifying an item on an order.  |
| <b>Line number</b>         | The number identifying an order line. May differ from the line number in the originating system.   |
| <b>Lines</b>               | <p>The number of order lines on the order that are assigned for fulfillment.</p> <p>At the <i>New Orders</i> screen, this is the number of order lines that have been assigned to the store location, but have not yet been accepted for processing.</p> |
| <b>Normal Shipping</b>     | Normal shipping, unlike manual shipping, uses an integration with an external shipping service, and typically generates a tracking number and a carrier-compliant label.   |
| <b>Number of Units</b>     | The number of units on an order line.  |
| <b>Order Orchestration</b> | Order Orchestration is the system that manages order assignment to fulfilling locations, as well as email notifications to the customer and other tasks. Store Connect is part of Order Orchestration.   |
| <b>Order ID</b>            | <p>A code assigned to identify the order in the originating system.</p> <p><b>Note:</b> Two orders can be assigned the same order ID if, for example, the customer added a new item to an existing order.</p>  |

| Field                  | Description   |
|------------------------|---|
| <b>Order Status</b>    | <p>Possible order statuses are:</p> <ul style="list-style-type: none"> <li>• <i>Accepted</i>: The order has been accepted at the assigned location.</li> <li>• <i>Canceled</i>: All lines on the order have been canceled.</li> <li>• <i>Complete</i>: At least one order line has been fulfilled, at least one order line has been canceled or rejected, and there are no remaining open order lines.</li> <li>• <i>Fulfilled</i>: The delivery order has been shipped, or the pickup or ship-for-pickup order has been picked up.</li> <li>• <i>Intransit</i>: The items on a ship-for-pickup order have been shipped from the sourcing location, and the next step is receipt at the pickup location. Listed as Intransit Polled on the Order History screen.</li> <li>• <i>New or New Order</i>: The order has just been received from the originating system, created in Order Orchestration, and assigned to a location for fulfillment or sourcing. A status of Polled follows immediately after New Order on the Order History screen.</li> <li>• <i>Open</i>: One or more order lines have been fulfilled, but one or more remain open (polled, accepted, intransit, picked, or received).</li> <li>• <i>Picked</i>: The delivery order has been picked and is ready for shipment to the customer, or the ship-for-pickup order has been picked and is ready for shipment to the pickup location. However, the line can still be in picked status even if it is under review and can't yet be fulfilled.<br/>When the sourcing location for a ship-for-pickup order is the same as the pickup location, the order goes into <i>Received</i> status immediately after being picked.</li> <li>• <i>Received</i>: The ship-for-pickup order has been received at the pickup location or sourced at the pickup location and is ready for pickup, provided it is not under review.<br/>When the sourcing location for a ship-for-pickup order is the same as the pickup location, the order goes into <i>Received</i> status immediately after being picked.<br/>Note that the View Order screen displays a status of <i>Ready for Pickup</i> rather than <i>Received</i>.</li> <li>• <i>Unfulfillable</i>: The order has been rejected from the assigned fulfilling location and can't be assigned to a different location for fulfillment. Pickup orders can't be reassigned. An order can also be in unfulfillable status if one or more order lines have been rejected, one or more order lines have been canceled, and there are no other order lines.</li> </ul> <p>Note that some of the statuses displayed at the <a href="#">Order History</a> screen are different.</p> |
| <b>Placed Location</b> | The code and description of the location where the order was placed. May represent another store location, the distribution center, or the web storefront.  |
| <b>Phone Number</b>    | The customer's phone number. You can search based on the customer's day or evening phone.   |
| <b>Request ID</b>      | A unique number to identify the order in Order Orchestration.   |



| Field                    | Description   |
|--------------------------|---|
| <b>Ship To</b>           | <p>The shipping address for a delivery order, if a separate shipping address was specified. For a ship-for-pickup order, this is the address of the store where the customer wants to pick up the order. Not displayed for a pickup order. Can include:</p> <ul style="list-style-type: none"> <li>• Company name</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> <p>If the address has been updated in the originating system since the order was originally created, it isn't automatically updated here. However, if the address has been updated through the <a href="#">Edit Ship To Details</a> window at any store location assigned to ship one or more items on the order, the most recently updated address is displayed at all store locations, and printed on the packing slip.</p> |
| <b>Sold To</b>           | <p>The customer placing the order. Can include:</p> <ul style="list-style-type: none"> <li>• Company name</li> <li>• Ship-to name, including title, first name, middle initial, last name, and suffix (such as Jr.)</li> <li>• First address line and apartment or suite number</li> <li>• Second through fourth address lines</li> <li>• City, state or province, zip or postal code, and country code</li> <li>• Daytime phone number</li> <li>• Evening phone number</li> <li>• Email address</li> </ul> <p>If the address has been updated in the originating system since the order was originally created, it isn't automatically updated in Store Connect.</p>   |
| <b>sourcing location</b> | <p>The location that provides the inventory for a ship-for-pickup order. In some cases, the items are sourced from the pickup location, and in other cases, the sourcing location ships the items to the pickup location. Depending on the configuration of your organization, the items can be sourced from multiple sourcing locations.</p>   |

| Field                             | Description   |
|-----------------------------------|---|
| <b>Status (Order Line Status)</b> | <p>The status that was applied to the order line. Possible statuses are:</p> <ul style="list-style-type: none"> <li>• <i>Accepted</i>: The order line has been accepted for fulfillment at the assigned location.</li> <li>• <i>Canceled</i>: The order line has been canceled.</li> <li>• <i>Fulfilled</i>: The order line has been shipped (delivery order), or picked up by the customer (pickup order or ship-for-pickup order).</li> <li>• <i>Intransit</i>: The order line on a ship-for-pickup order has been shipped from the sourcing location to the location where the customer wants to pick up the order.<br/><b>Note</b>: An additional status of <i>Intransit Polled</i> is displayed for order lines only at the <i>Order History</i> screen. This status doesn't represent an additional update to the Intransit status.</li> <li>• <i>New Order</i>: The order line has just been received from the originating system, created in Order Orchestration, and assigned to a location for fulfillment or sourcing.<br/><b>Note</b>: An additional status of <i>Polled</i> is displayed for order lines only at the <i>Order History</i> screen. This status doesn't represent an additional update to the New Order status.</li> <li>• <i>Picked</i>: The order line has been picked and can be: <ul style="list-style-type: none"> <li>– Shipped (for a delivery order, or sent from the sourcing location to the pickup location for a ship-for-pickup order)</li> <li>– Picked up (for a pickup order; note that if the sourcing location for a ship-for-pickup order is the same as the pickup location, the order line goes into <i>Received</i> status immediately after being picked)<br/><b>Note</b>: The order can be shipped or picked up provided it is not under review.</li> </ul> </li> <li>• <i>Received</i>: The ship-for-pickup order has been received at the pickup location and is ready for pickup, provided it is not under review.<br/>When the sourcing location for a ship-for-pickup order is the same as the pickup location, the order line goes into <i>Received</i> status immediately after being picked.</li> <li>• <i>Rejected</i>: The order line has been rejected by the assigned fulfilling location. After a rejection, Order Orchestration either reassigns the order line or changes its status to Unfulfillable.</li> <li>• <i>Unfulfillable</i>: The order line can't be fulfilled through Order Orchestration. This might occur if, for example, there are no locations that stock the item, or the assigned pickup location rejects the order.</li> </ul> <p>Note that some of the statuses displayed at the <a href="#">Order History</a> screen are different.</p> |
| <b>Store</b>                      | <p>The code identifying the store assigned to fulfill an order, and the description of the store.</p>   |
| <b>Tracking Number</b>            | <p>The number used to track a shipment. Available for review at the <a href="#">Order History</a> screen. A required entry if you use manual shipping to ship a delivery order. Assigned by the shipping service if you use normal shipping.</p>  |

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| <b>Field</b>        | <b>Description</b>  |
|---------------------|---|
| <b>Under Review</b> | Indicates that the order is currently under review and not eligible to be picked up, shipped to the customer, or shipped to the pickup location; however, you can still accept, pick, or receive an order that is under review.   |
| <b>User</b>         | The ID or name of the user who performed an update or transaction for an order or order line. Displayed after “By” at the Order History screen. Maybe be a code identifying the system who performed the update or transaction, such as when the order is submitted to Order Orchestration. |

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## Frequently Asked Questions

**If data is cut off:** If the screen area is very small, you might need to use the scroll bar at the bottom of the screen to display all columns. For example, at a list screen such as the *New Orders* screen, you might need to use the bottom scroll bar to display the number of order lines on the right.

**If you logged into the wrong store location:** If you need to change store locations after logging in (for example, if you logged into store A and you meant to log into store B), you need to log out of Store Connect and then log back in.

**Update failed:** You might see this error message when you attempt to complete the next processing step for an order if an update has made the order or line ineligible for the processing step. For example, if you attempt to confirm shipment of a delivery order, you might see this error message if the order has recently been canceled. You also might see an error message if an order you were attempting to ship or confirm for pickup was recently flagged as *Under Review*.

**Why is the same order number listed for two different orders?** This might occur if, for example, the customer placed the order and then added an additional item to the order.

**How to display the available options at the bottom of a list screen:** When at a list screen, such as *New Orders* or *Ready to Pick*, you need to highlight an order to select it and display the available options at the bottom of the screen.

**Why does the order have additional items when I view it at the View Full Order screen from the All Orders screen?** The lines on a delivery or retail pickup order can be split across multiple store locations if, for example, item 1 is available only at store A but item 2 is available only at store B. The *View Full Order* screen displays all order lines, regardless of whether they are assigned to your current store location, while other screens display order lines only if they are assigned to your current store location.

**What is normal shipping?** Normal shipping, unlike manual shipping, uses an integration with an external shipping service, and typically generates a tracking number and a carrier-compliant label.

**Trouble logging into Store Connect:** The following issues can prevent a store associate from logging into Store Connect. If one of the following occurs for a store associate, contact your system administrator:

- A screen indicates that you don't have access to Store Connect. If your system administrator provides you with access, you can select the Retry button.
- A screen indicates that you do not have access to any store locations. You need to try logging in again after your system administrator has provided you with access to one or more store locations.

**Unexpected screen issues:** Using the back button can produce unpredictable results, such as an incorrect option on a screen, and should be avoided. Instead, click the navigation options to return to a previous screen.

**How is the shipping address for a delivery order changed?** If the shipping address has been updated through the *Edit Ship To Details* window at any store location assigned to ship

one or more items on the order, either to the customer for a delivery order or to a store location for a ship-for-pickup order, the most recently updated address is displayed at all store locations, and printed on the packing slip.

**What are the supported languages?** To specify a different language, append the code from this list to the end of the Store Connect URL:

- zh\_CN—Chinese (simplified)
- nl\_NL—Dutch
- fr\_FR—French
- de\_DE—German
- it\_IT—Italian
- ja\_JP—Japanese
- pt\_BR—Portuguese (Brazilian)
- ru\_RU—Russian
- es\_ES—Spanish
- sv\_SE—Swedish

To switch to a different language after logging out, you need to either clear your browser cache or append the new language code to the end of the URL.

**Why is the date filled in at the Search drawer when I enter a 4-digit number?** If you enter a 4-digit number in a date field, your entry is interpreted as the year, and the current day and month are filled in. For example, if you enter 2022 and the current date is April 1, the date is filled in as 4/1/2022, depending on the date format for your locale.

**What happens if your session is inactive?** If your session is inactive for the time period specified by your system administrator, you are automatically logged out. Three minutes before your session is due to expire, a warning window opens. This window provides the option to log out, or to extend your session.

