Oracle® Retail Order Administration Cloud Service

Modern View Online Help

Release 24.1.101.0

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Oracle Retail Order Administration Cloud Service Modern View Online Help, Release 24.1.101.0

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Preface

The Order Administration Cloud Service Modern View online help describes the screens you use in Order Administration Modern View.

Audience

This document is intended for users of the Oracle Retail Administration Cloud Service.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

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

Oracle Help Center (docs.oracle.com)

Oracle Retail Product documentation is available on the following website https://docs.oracle.com/en/industries/retail/html

Comments and Suggestions

Please give us feedback about Oracle Retail Help and Guides. You can send an e-mail to: retail-doc_us@oracle.com

Oracle Retail Cloud Services and Business Agility

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.

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
Getting Started

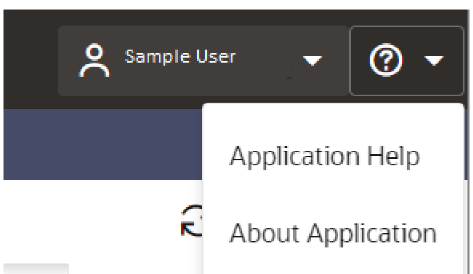
About Oracle Retail Order Administration

Oracle Retail Order Administration Cloud Service (OA) manages direct-to-consumer orders, whether they are taken on the website, contact center, or in the retail store.

About this Online Help

Modern View (MV) is a module of Order Administration that provides options including reviewing batch jobs, unlocking orders, managing external applications, and checking gift card balances. Modern View also includes Contact Center. Contact Center is the component of Modern View that allows a customer service representative (CSR) to perform order entry as well as order inquiry and order maintenance functions.

The **Modern View Online Help** describes how to perform the functions available within the order process. Details for account providers and methods supported through EFTConnect managed through the Payment Configurations screen is also included. In the Modern View application, there are two help icons in each window of the application: Application help and context sensitive help via the *Help Panel*. The top help icon (displays in the upper right hand corner of each page) has a drop down arrow and provides a route to view the Application Help. *General Features* to learn more about the screen components on the *Home* page.



Selecting **Application Help** opens a new browser tab showing this page (Getting Started) on the Modern View Online Help. This is the top level of help and no matter which screen you are in within the MV application, it will take you to this page. From there, you can select a different help topic for review. The window consists of 3 panels:

- Table of Contents
- Body of help
- Sublevel headings

Clicking the >| icon hides the right side panel for more content to be shown.

When you select the  help icon from any application window in Modern View, it opens a panel on the right side of the application. This gives us three options of help on each page taking you to a specific section of the MV online help:

- Page Overview
- Page Options

- Fields on this page

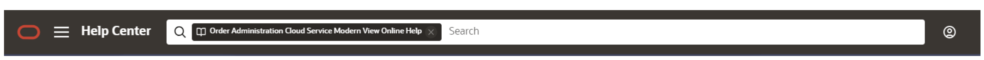
For example, clicking the icon from the **Order Summary** window opens the *Help Panel*. Selecting:

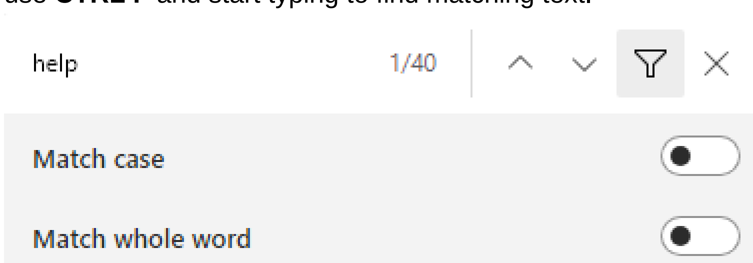
- **Page Overview** opens the overview section of help for Order Summary and provides a brief summary of the page.
- **Page Options** opens the help topic describing the actions that can be performed on the Order Summary page.
- **Fields on this page** opens the help topic listing the fields on the Order Summary page, with links to field definitions.

The selected help topic opens in a separate tab of your browser. Once the online help opens, either through the help icon or the help panel, you can navigate and search through the online help.

Navigating within the Online Help

There are several ways to get about within the online help. You can:

- use the **Table of Contents** to drill down or expand the chapters. Right clicking the subheadings in the panel on the right allows you to open the link in a new window or tab.
- use the **Previous Page** and **Next Page** buttons at the bottom of each page to move through the help one page at a time.
- enter text to search in the **Search** 

field at the top of the screen.
- use **CTRL F** and start typing to find matching text. 

. Find looks for text on the current page only. The filter allows you to select to match the case and/or word. The arrows allow you to rotate between the results.
- click on an external link to go direct to another associated guide.

About the Classic View Online Help

To complement the Classic View Online Help, there are four associated guides. Direct hyperlinks to these guides are linked from within the online help.

- The Reports Guide describes the contents of each report and includes links to sample reports.
- The Technical Guide provides more detailed information to supplement the content in the online help.

- The Implementation Guide includes information on configuration options, such as defining properties. The system control values (SCV) are documented in this guide.
- The Integration and Import/Export Guide provides the details of Oracle internal integrations, imports and exports, such as Oracle Retail Customer Engagement (ORCE) and Order Orchestration (OO) integration, and external integrations such as Avalara AvaTax, and Experian EDQ address API.

Quick Links

For information on:	See:
Using the System Control table, including how to set up and change values	System Control Table Components
A particular system control value	System Control Values
Secured features	Setting Up Secured Features

Where to Look for Additional Help

A variety of guides provide you with complete information about Oracle Retail Order Administration. If you navigated to the help from the application, you can access the main Order Management Suite Cloud Service documentation page from here. Additional guides provide supplemental information.

- Omnichannel Web Service Authentication Configuration: MOS ID 2728265.1
- Web Services Guide and Order Maintenance Web Services Guide: MOS ID 2953017.1
- Security Guides: MOS ID 2953017.1
- Technical References (includes Reporting Guide): MOS ID 2953017.1
- Data Models: MOS ID 2910995.1
- Documentation for other retail products: https://docs.oracle.com/en/industries/retail/index.html

2 System Control Values

System Control Values

J

K

M

3 Modern View and Contact Center Overview

Modern View is a module of Order Administration that provides options including reviewing batch jobs, unlocking orders, managing external applications, and checking gift card balances. Modern View also includes Contact Center.

Contact Center is the component of Modern View that allows a customer service representative to perform order entry as well as order inquiry and order maintenance functions, such as:

- Reviewing customer and order information.
- Updating customer information, such as the customer's name and address, and marketing preferences.
- Updating order information, such as the items on the order, pricing, and payment methods.

Home page: When you open Modern View, you advance automatically to the *Home* page, and this page remains open while you are working in Modern View.

In this topic:

- *Synchronizing Data between Order Administration Classic View and Modern View*
- *General Features*
  - *Header Components*
  - *Page Title*
  - *Left-Hand Navigation Panel*
  - *Tasks or Pin the Menu*
  - *Classic View*
  - *Help Panel*
  - *Language*
  - *Date Format*
  - *Decimal and Thousand Separator Format*
  - *Browser Back Button*
- *Modern View Configuration*
  - *Work with Contact Center (WWCC)*
  - *Image Setup for the Home Page*
  - *Item and SKU Image Setup*
  - *Delivered Menus*

Synchronizing Data between Order Administration Classic View and Modern View

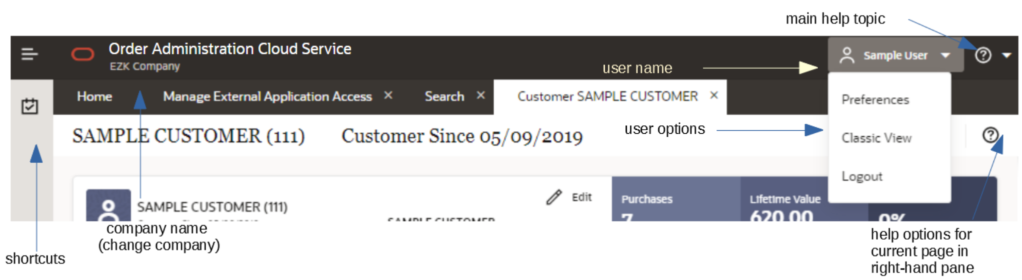
Static data, such as origin and sales representative, is set when you sign in to the Modern View application. If a user in Classic View changes data, such as adding, changing, or deleting a sales representative, this change is not reflected in the Modern View application until the user signs out and signs back in to the application.

Real time data, such as inventory availability, updates in Modern View immediately in order to provide the most accurate information in Contact Center.

General Features

- *Header Components*
- *Page Title*
- *Left-Hand Navigation Panel*
- *Tasks or Pin the Menu*
- *Classic View*
- *Help Drawer*
- *Date Format*
- *Decimal and Thousand Separator Format*
- *Browser Back Button*

Header Components



The following information displays at the top of each page.

> **Note:**
>
> See the *Left-Hand Navigation Panel* for information on shortcuts available to the left.

- **Tab Name** identifies each open page. The tab name is from the **Modern View Description** for the menu option, if defined in Work with Menu Options in Classic

View; otherwise, the tab name is from the **Description** defined for the menu option.

- **Oracle Logo** (displays in the upper left hand corner of each page)
- **Order Administration Name** (displays to the right of the Oracle logo)
- **Company Name** (displays below the Order Administration name): This is the name of the currently selected company. If you have authority to more than one company, you can select the company name to advance to the *Select Company* window, where you can select another company to work in. Only companies to which you have authority are available for selection.
- **User Name** (displays at the upper right): This is the user name of the person logged into the application.

  The following options are available in the **User Name** drop-down:

  - **Preferences**: Select the **Preferences** option to advance to the *Preferences* window where you can define user display settings in the application.
  - *Classic View*: Return to Classic View of Order Administration.
  - **Logout**: Select the **Logout** option to log out of the application. This effectively logs you out of both Modern View and *Classic View*. You return to the initial Order Administration login page.

> **Note:**
>
> You need to unlock all locked orders before signing out.

- **Help icon** (displays in the upper right hand corner of each page): When you select the **Help** icon, your options are:

  - Select **Application Help** to open this overview help topic in a separate browser tab. From there, you can select a different help topic for review. The help will remain open in a separate browser tab until you close it.
  - Select **About the Application** to advance to the *About the Application* window.

  Help panel: Below the help icon in the upper right hand corner is a link to the help panel, which opens to the right of the page. The help panel enables you to select the help content for the currently displayed page, with options to display an overview, options, or fields on the page. See the *Help Panel* for more information.

- **Page tab** (displayed below the header components): A separate tab displays for each page you have open, with the earliest opened tab to the far left and the most recently opened tab to the far right. The tab you are currently viewing is white.

  Key information displays in the tab title, allowing you to identify the contents of the tab:

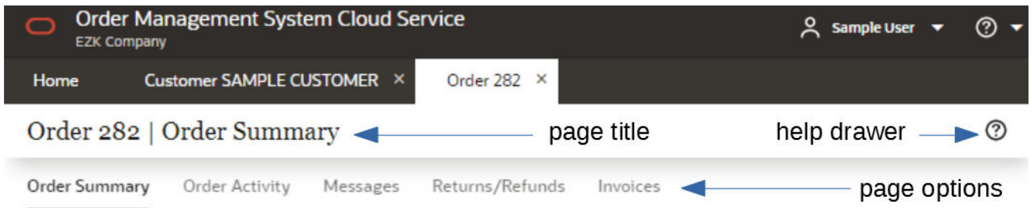
  - If the tab is related to a customer, the customer's last name displays. If the customer does not have a last name, the company name displays as the tab title.
  - If the tab is related to an order, the order number displays as the tab title.

  Select the **X** icon in a tab to close the tab.

> **Note:**
>
> You cannot close the tab for the *Home* page.

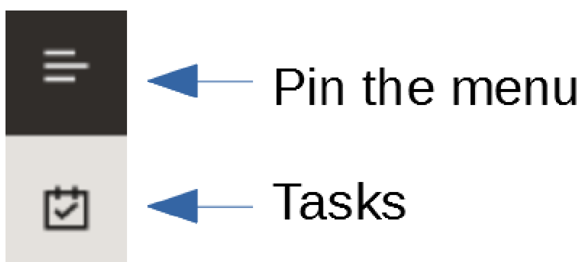
First option opens automatically: The first Modern View option in the user's default menu opens automatically.

Page Title



The page title identifies the contents of the page you are reviewing. As you scroll down on the page, the system continues to display the page title; this allows you to easily identify the information you are reviewing and perform any of the actions that are available in the page title from anywhere on the page.

Left-Hand Navigation Panel



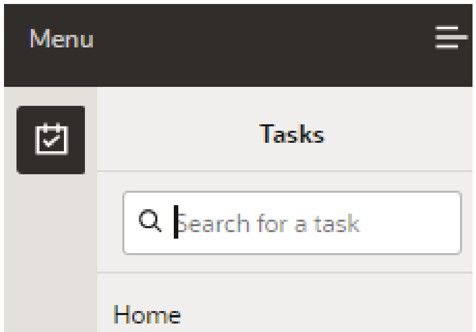
The left-hand navigation pane provides the following options:

- **Pin the Menu or Tasks:** Both **Pin the Menu** and **Tasks** open a menu to the right of the navigation panel, displaying the tasks available in the current menu, including advancing to a sub-menu. You can also use the enterable **Search** field in the Tasks menu to search for a task. If a menu option is included in more than one menu or sub-menu for the user, it appears more than once in the search results.

  When you use the **Pin the Menu** option, the expanded menu remains open; when you use the **Task** option, the menu closes after you select an option or sub-menu. Besides this difference, the **Pin the Menu** option and the **Task** option offer the same functions. See *Tasks or Pin the Menu* for more information.

Tasks or Pin the Menu

The options available by selecting **Tasks** () or **Pin the Menu** ( ) are based on the **Default Menu** defined for your user profile, as well as your menu option authority.



About menus: The menus available for use in Modern View are configured through Work with Menus (WMNU) in Classic View. Menus can include:

- Modern View options, such as Batch Job Statistics, providing access to the option in Modern View only.
- Classic View options, such as Work with Background Jobs, providing access to an option available in Classic View only.
- Options available in both Modern and Classic View, such as Unlock Order, providing access to the option in both Modern View and Classic View.
- A combination of Modern View and Classic View options, so that the user automatically has the appropriate options available in either view.
- Other sub-menus. For instance, a main menu that includes Contact Center options might also include a sub-menu for system administration tasks.

Required authority: The user must have ALLOW or DISPLAY authority for access to a menu option. In most cases, DISPLAY authority provides the user the same options as ALLOW authority, such as updating or unlocking an order. However, ALLOW authority is required for access to Order Entry and Display Batch Job Statistics.

Menu option differences between Classic View and Modern View: Note that, unlike Modern View, Classic View provides the **Fast path** option to select an option that is not included in a menu. In Modern View, if the option is not included in the user's default menu or a sub-menu but the user does have access to the option, it is included in an **Additional Options** menu below the defined menus assigned to the user.

Example: If a user is assigned authority to the MULO (unlock suspended order or batch) menu option, but the user's default menu does not include MULO, or include a sub-menu that includes MULO, the MULO option in Modern View is available under the menu title of **Additional Options**.

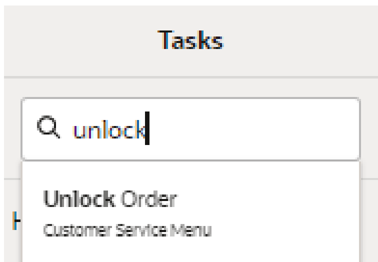
Default menu assignment: All users who will work in Modern View should normally be assigned a **Default menu** through the Work with Users option in Classic View; otherwise, all options that the user has authority to are listed under **Additional Options**.

Options are listed in the sequence defined for the menu in Classic View.

Delivered menus: See **Customizing Menus** in the Classic View online help for a list of the delivered menus that include Modern View options.

> **Note:**
>
> If an option is assigned to more than one menu or sub-menu, it is possible that it will be displayed more than once through the **Tasks** option.

Searching for an option: Use the search field to find an available option by entering a search term. For instance, enter "unlock" to search for the Unlock Order option.



Classic View

Select **Classic View** from the **User Name** drop-down to return to *Classic View* of Order Administration.

> **Note:**
>
> This option is not available when you advance to Modern View through a direct link. See Direct Link to Modern View for background.

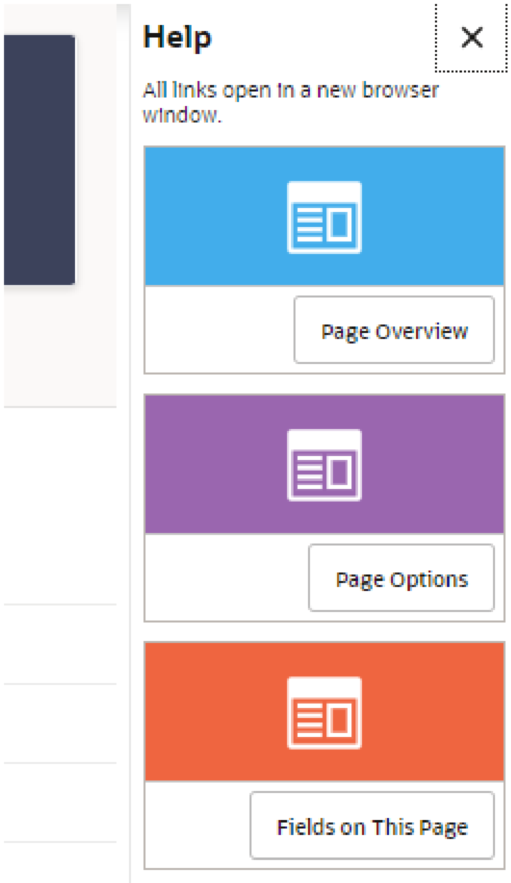
Company changes: If you change company while you are working in Modern View, the company change is not retained when you return to Classic View. The active company in Classic View is the one that you were working in before you advanced to Modern View.

Help Panel

While the help link in the upper right of the page opens the default help topic, the help icon in the page title line opens the **help panel**, which enables you to open the help topic for the current open page. For example, when the Order Summary page is open, the help panel takes you straight to help contact for that page.

The help panel also enables you to select the type of help content to review:

- **Page Overview:** Provides a brief summary of the page.
- **Page Options:** Describes the activities you can perform on the page.
- **Fields on the Page:** Lists the fields available on the page, with links to field definitions.



The selected help topic opens in a separate tab of your browser. Once the online help opens, either through the help icon or the help panel, you can navigate and search through the online help.

Closing the help panel: When the help panel is open, the page content shifts to the left. To close the help panel, select the **Help** icon again or the X icon. If the help is open in a separate browser tab, it will remain open in that tab until you close it.

Language

The language used on pages is from the **Locale** defined for the user.

Date Format

When a user logs in to the application, the system looks at the **Date Format** defined for the user in the Users table and the **Date Format** defined for the company in the Company table to determine the date format to display in the application.

Which Date Format Defaults?

Date Format on Pages and Windows in the Application

Dates on pages and windows in the application display in the user's date format.

> **Note:**
>
> Regardless of the date format that displays in the application, dates are stored in the database in CYYMMDD format.

Calendar Widget

When you select a date from the calendar widget, the date displays in the date format defined for the user.

Date Format of User-Entered Text

When a user enters a date in a text field, the system stores and displays the date in the format it was entered.

> **Note:**
>
> 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.

Date Format in APIs

Dates in APIs do not use the date format defined for the user or company. See each specific XML message in the Classic View help for more information on the date format for each message.

Date Format on Reports, Forms, and Emails

All system generated data, such as reports, forms, and emails, display the date in the date format for the company. Reports that are not associated with a company display the date in the date format defined for the DEFAULT_DATE_FORMAT property.

Decimal and Thousand Separator Format

The system looks at the DECIMAL_SEPARATOR property to determine the character format used to indicate the decimal place in a number.

The system looks at the THOUSAND_SEPARATOR property to determine the character format used to separate groups of thousands.

Supported Formats

- , (comma)
- . (period)

Examples:

If the thousand separator is comma and the decimal separator is period, numbers display as `1,234,567,890.12`.

If the thousand separator is decimal and the decimal separator is comma, numbers display as `1.234.567.890,12`.

Browser Back Button

The **Back** button closed your currently open tabs and returns you to the *Search for Orders or Customers* page. If you have been working on an order and it is currently locked, it will remain locked, and will need to be unlocked.

Modern View Configuration

Purpose: Background on Modern View configuration includes:

- *Work with Contact Center (WWCC)*
- *Image Setup for the Home Page*
- *Delivered Menus*

Work with Contact Center (WWCC)

The **Work with Contact Center (WWCC)** menu option allows you to define which fields display on the *Search for Orders or Customers* or in *Order Entry* for the currently selected company.

- The **Contact Center Field Display** screen in the **Work with Contact Center (WWCC)** menu option controls which fields display in *Order Entry* or on the **Search for Orders or Customers** page for the specified company. See *Fields in Order Entry* and *Fields on Search for Orders or Customers* for a complete list of the fields that can display on each of these pages.
- The **Contact Center Order Search Field Sequence** screen in the **Work with Contact Center (WWCC)** menu option controls the order of the fields that display in *Order Entry* and the *Search for Orders Panel*, and *Search for Customers Panel* for the specified company. In addition, this page also controls which fields initially display in each panel before you need to select the **> Additional Order Search Fields** or the **> Additional Customer Search Fields** link to display the remaining fields in the panel.

User configuration: Use the **Modern View at Initial Login** setting at the Create User or Change User screen to define whether the user advances directly to Modern View when first logging into Order Administration, or needs to select the Modern View icon.

Menu option authority: Use the **Menu Option Auth** option in Work with Users to define whether the user has authority to any menu options whose **Type** setting is set to **Modern View**.

Image Setup for the Home Page

Logo setup: The *Home* page displays the company logo. You can use a default logo or set up company-specific logos.

- **Image size:** The company image should be 270 pixels wide by 240 pixels high.
- **Image location:** Specified in the IMAGE_URL_PREFIX property (PROP).
- **Image naming convention:** The company logo image file name for menus should consist of:
  - the label `MenuLogo` and the zero-padded company number in order to display individual company-specific logos.
  - the jpg extension.

Example: The logo image file for company 6 should be named `MenuLogo006.jpg`.

If there is no image file for the user's current company, the Home page displays the default logo delivered with the application, named `MenuLogo.png`.

> **Note:**
>
> If you add, change, or delete the company image for menus, menu screens in Order Administration might not display the change immediately because the image might be cached on your local computer. To display the current company image for menus, exit Order Administration and clear the cache in your browser.

Image files should not exceed 10K in size.

Item and SKU Image Setup

When the *Use External Item Image (L55)* system control value is selected, the following pages and windows display an item or SKU image, if specified for the item or SKU:

- **Order Summary:** Displayed at the *Order Lines Panel*, the *Add Item* window, *# Order Lines In This Invoice Panel* at the **Invoices** tab, the *Select Variable Set Items* window, and the *Select Coordinate Items* window.
- **Customer Order List:** Displayed at the *Frequently Purchased Items Panel* that is available by selecting Frequent Purchases.
- **Order Summary** or **Order Entry**: Displayed at the *Select Coordinate Items* window.
- **Registries Panel:** See *Registry Panel Fields*.

When the system control value is selected, a placeholder is displayed if no image is defined for the item.

Otherwise, if the *Use External Item Image (L55)* system control value is not selected, these pages and windows do not display item or SKU images.

For more information: See the **Item Image/Info Link Screen** in the Classic View online help for more information on setting up item images.

Delivered Menus

Delivered options and menus for Modern View: The following table lists the options delivered in menus for Modern View.

> **Note:**
>
> The menus mentioned below include Classic View as well as Modern View options.

Option	Fast Path	Menu(s)
Order Entry	CCOE	ORDERENTRY

Option	Fast Path	Menu(s)
Batch Job Statistics	DBJS	OPERATIONS
Held Order Summary	DHOS	HELDORDERS
Enterprise Data Import History	EDIH	UPLOAD
Manage Held Orders	ERHO	HELDORDERB HELDORDERS
Operations Summary	FLSH	MANAGEMENT OIOMMENU
Manage External Application Access	MEAA	SYSADMIN
Check Gift Card Balance	MSVB	ORDERENTRY
Unlock Order	MULO	SYSADMIN
Search for Orders or Customers	OIOM	OIOMENUB OIOMMENU ORDERENTRY
Manage Rejected Deposits	SRDP	AUTHMENU
Tax Files Upload	TAXU	SYSADMIN
Payment Configurations	WPMT	ACCTGSETUP

4 Advance to Modern View

Overview: There are three ways to advance to Modern View:

- **Automatic advancement:** If the **Modern at Initial Login** setting is selected for your user ID in Classic View, you advance to Modern View automatically when you log in.
- **Select Modern View:** If the **Modern at Initial Login** setting is not selected for your user ID in Classic View, you select the Modern View icon to advance to Modern View. See *Advance to Modern View*.
- **Follow a direct link:** You can use a direct link to open Modern View and display one or more customers, orders, or both. See Direct Link to Modern View.

Home page: You advance automatically to the *Home* page, and this page remains open while you are working in Modern View.

> **Note:**
>
> If you do not have sufficient authority to review or work with orders, no customer or order search options are available. Contact your system administrator if this occurs.

In this topic:

- *Advancing to Modern View from Classic View*
- *Direct Link to Modern View*
- *Settings*
- *Task Notification Window*
- *Logging Out*

Advancing to Modern View from Classic View

Purpose: Use the Modern View icon () at the top of the screen in *Classic View* of Order Administration to advance to Modern View if the **Modern at Initial Login** setting for your user ID is not selected in Classic View.

You advance automatically to the *Home* page, and this page remains open while you are working in Modern View.

Direct Link to Modern View

Purpose: You can advance directly to Modern View and open one or more customer or order records through a direct link, and perform any updates that would normally be available to you. You can use a direct link to open up to 5 customers or orders at once. If more than 5 customers or orders are specified, the additional customers or orders are ignored.

Format of the direct link: The direct link must be formatted as `https://[Modern View URL]/[PORT]/cc/company=123&custNbr=123&custNbr=456&orderNbr=12345&orderNbr=67890`, where:

- `[Modern View URL]` is the URL you use to access Modern View.
- `[PORT]` is the port you use to access Modern View.
- `company=123` is the company where the customer and/or order records exist.
- `custNbr=1234` is a customer number to display. This is the Order Administration customer number unless the *ORCE Customer Integration* (L37) system control value is set to INTERACT and the *Use Oracle Retail Customer Engagement Customer Number on Search* flag is selected in Work with Contact Center (WWCC); in this case, the custNbr should be the Customer Engagement customer ID.
- `orderNbr=12345` is an order number to display.

It may take a few moments for the Modern View pages to open for each specified customer and order number.

Authentication: To start a new session through a direct link, you need to enter your authentication information to log in. If you already have an active Classic View or Modern View session open in the browser, you do not need to provide authentication information.

No Company Authority: If you do not have authority to the company specified in the direct link, if the company number does not exist, or if your user profile is disabled, the No Company Authority window opens. You will be logged out if the issue is that you do not have authority to the specified company, even if you have authority to other companies.

The No Company Authority window also opens if you do not have authority to Order Administration.

Menu Option Authority: If you do not have authority to the Order Inquiry/Maintenance (OIOM) menu option, the Menu Option Authority window opens. However, you are not logged out, and you can close the window and perform other actions that are supported by your authority.

If a specified customer or order does not exist: When you advance to Modern View, the Invalid Inquiry window opens indicating that one or more specified customers or order numbers are invalid; however, any valid customers or orders specified in the direct link are displayed. If none of the specified customers or orders exist, you remain in Modern View and can work with other customers or orders, or perform any other tasks if you have the required authority.

Invalid Inquiry (order status): Orders that are in Error or Suspended status cannot be displayed through a direct link. If the direct link specifies an order in this status, the Invalid Inquiry window opens.

If you enter the direct link URL in the address bar for an active session: If you enter the direct link URL in the address bar for a Modern View session that is currently active in Chrome, the Leave site? window opens. If you confirm, you will be logged out of your current session. Any orders you were currently updating with will be locked.

> **Note:**
>
> To avoid potentially unpredictable results, Oracle recommends that you limit sessions opened through the direct link to a single browser tab.

Other errors: A Notifications window indicates that an unexpected error occurred if the direct link URL was not formatted correctly, as described above. However, if other information in the direct link was formatted correctly, that information is displayed. For example, this window might not open if the customer number specifications were formatted correctly; but if order numbers were specified correctly, tabs open for the orders.

Note:

- When you advance to Modern View through a direct link, the option to advance to Classic View is not available.
- You need to be sure to unlock any locked orders if you are using the direct link option before closing the tab.

Settings

Purpose: The settings applied when you advance to Modern View are described below.

- **Company:** The currently selected company from Classic View of Order Administration is active when you advance to Modern View. Optionally, you can change to another company for your work in Modern View if you have authority. See *Select Company* for more information.
- **Locale:** The system looks at the Locale defined for the user to determine the language to use on Modern View pages. See **Regional Settings** in the Classic View help for more information.
- **Date Format:** The system looks at the **Date Format** defined for the user in the Users table and the **Date Format** defined for the company in the Company table to determine the date format to display in certain areas of the application. See **Regional Settings** in the Classic View help for more information.
- **Number Formats:**
  - The system looks at the DECIMAL_SEPARATOR property to determine the character format used to indicate the decimal place in a number.
  - The system looks at the THOUSAND_SEPARATOR property to determine the character format used to separate groups of thousands.

Task Notification Window

The system displays a **Notification** window when you log in if one or more open or in process tasks exist that are assigned to you or one or more of your task groups. You can review, work with, and resolve tasks assigned to you or your task groups using the **Work with Tickler Users/User Groups (WTIC)** menu option. Select **OK** at this window to advance to the *Search for Orders or Customers* page.

Logging Out

Select **Logout** from the **User ID** drop down box in the header of a page in the application. This effectively logs you out of both Modern View and Classic View. You return to the initial Order Management System login page.

> **Note:**
>
> You need to unlock all locked orders before signing out.

5
Home

Purpose: The **Home** page is the default page that opens when you advance to Modern View, providing:

Summary tiles displaying summaries of:

- **Sales Summary:** Sales for the current date, including the total merchandise value sold for the current day and month.
- **Operations Summary:** Entered orders for the current date, as well as the average order line merchandise value.
- **Held Order Summary:** Current held orders, including merchandise value and number of held orders.

Each tile provides a link to the related report page. For example, highlight the Operations Summary tile and click **View Report** to open the *Operations Summary* page.

Illustration of summary data is displayed below when you highlight each tile. For example, when you highlight the Sales Summary tile, an illustration of Sales Today by Order Type is displayed.

Additional information and options at this page includes:

- **Announcements** in the upper right, if defined for the company.
- **Quick links** below the summary data, if defined for the user's user class.
- **History of recent activity,** with links.
- **Company logo** in the upper right.
- **Customer and order search fields.**
- **Option to check gift card balance.**

Some of the data displayed on this page does not update dynamically. Click **Refresh** in the upper right to update the displayed sales and held order totals.

How to display: The **Home** page opens by default, and remains open while you are working in Modern View.

For more information:

- *Home Page Options* for step-by-step instructions on the actions you can perform on the **Home** page.
- *Fields on the Home Page* for a description of the fields on the **Home** page.

Home Page Options

Purpose: The following options are available on the **Home** page.

- *Refresh*
- *Sales Summary Options*

- *Operations Summary Options*
- *Held Order Summary Options*
- *Search for Orders or Customers*
- *Use Quick Links*
- *View Recent Activity*
- *Check Gift Card Balance*

For more information:

- *Home* for an overview of the **Home** page.
- *Fields on the Home Page* for a description of the fields on the **Home** page.

Refresh

Click **Refresh** at the upper right corner to refresh the totals displayed at the **Home** page.

The totals do not refresh automatically when you advance to this page.

> **Note:**
>
> It is not necessary to click **Refresh** to update quick links.

Sales Summary Options

The Sales Summary tile is highlighted by default when you advance to the **Home** page.

ALLOW authority to Sales Summary (DSSS) is required to display this tile.

The following options are available when the Sales Summary tile is highlighted:

Display Sales Summary Bar Chart

When the Sales Summary tile is highlighted, the Sales Summary bar chart is displayed.

The bar charts illustrates the percentage of merchandise value shipped for each order type. Only order types that have had sales activity on the current date are illustrated.

If a particular order type made up less than 1% of the merchandise value shipped, it is not displayed in a bar chart.

The percentage each order type represents in the total merchandise value of sales for current date is displayed. Percentages listed are rounded to whole numbers.

Advance to the Sales Summary Page

With the Sales Summary tile highlighted, click **View Report** to open the *Sales Summary* page in a new window.

Operations Summary Options

ALLOW authority to Display Order Control Summary (FLSH) is required to display this tile.

The following options are available when the Operations Summary tile is highlighted:

Display Operations Summary Bar Charts

When the Operations Summary tile is highlighted, the Operations Summary bar charts are displayed.

The bar charts illustrates the Unit Count, Order Count, and Merchandise Value of each order activity that has taken place for the current day.

Optionally, position your cursor over a segment of a bar chart to display the percentage that the activity represents for the day's total. For example, position your cursor over the Entered activity in the Unit Count bar chart to display the percentage of the day's activity represented by entry of order lines. Percentages are rounded to one decimal position (for example, 28.3).

Advance to the Operations Summary Page

With the Operations Summary tile highlighted, click **View Report** to open the *Operations Summary* page in a new window.

Held Order Summary Options

ALLOW authority to Display Held Order Summary (DHOS) is required to display this tile.

The following options are available when the Held Order Summary tile is highlighted:

Display Held Order Summary Bar Charts

When the Held Order Summary tile is highlighted, the Held Order Summary bar charts are displayed.

About the Y (Vertical) Axis: The Y axis displays a scale to illustrate the total number of held orders by hold reason. The scale is proportional to the largest number of orders held for each reason. For example, if the hold reason with the largest number of orders includes 83 orders, the **Orders** scale goes from 0 to 100 by tens.

For each hold reason:

- The hold reasons are listed in alphabetical order based on the *Hold Reason* descriptions, and the descriptions are displayed vertically if there is not enough space to display them horizontally; in this case, the descriptions may be truncated.
- **Bar indicating total number of orders:** The height of the bar displayed for the hold reason is proportional based on the number of orders currently held for that reason.

Hold reasons displayed: Only system holds assigned at the header level are displayed. If an order is on a ship-to hold (such as ship-to fraud) or a pay type hold, then there is also a system hold assigned at the header level, so only these hold reasons are displayed in order to overstate assigned holds.

Position your cursor over the bar for the hold reason to display:

- The *Hold Reason* description.
- The total number of orders assigned that hold reason. Orders with multiple ship-tos increase the total by 1, not by the number of ship-tos. User-assigned holds, identified by (User Hold), are listed separately from system-assigned hold if the hold has been applied both by the system and by a user.

If multiple hold reasons applied to an order: An order can have multiple hold reasons applied, and in this case it is included in the total order count and merchandise value for each hold reason. For example, an order is on a time hold, and a user hold has also been applied. The order is included in the totals for both hold reasons.

Advance to the Held Order Summary Page

With the Held Order Summary tile highlighted, click **View Report** to open the *Held Order Summary* page in a new window.

Search for Orders or Customers

The options to search for existing orders or customers are displayed only if you have authority to **Order Inquiry/Maintenance** (OIOM).

See *Search for Orders or Customers* for more information.

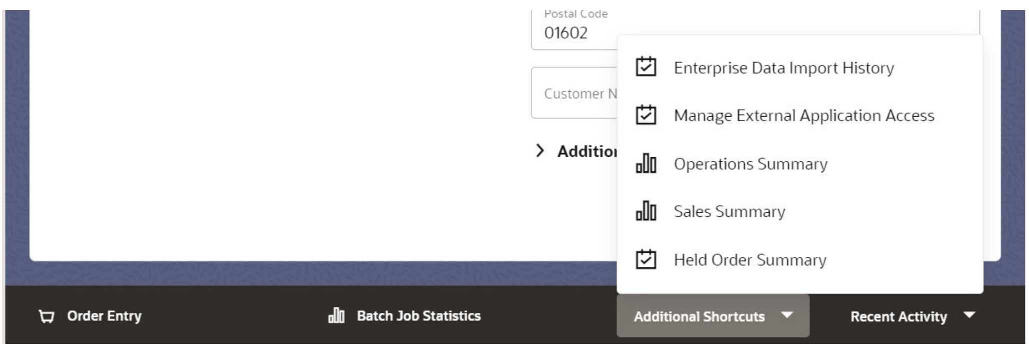
Use Quick Links

Quick links for menu options are available on the **Home** page, if:

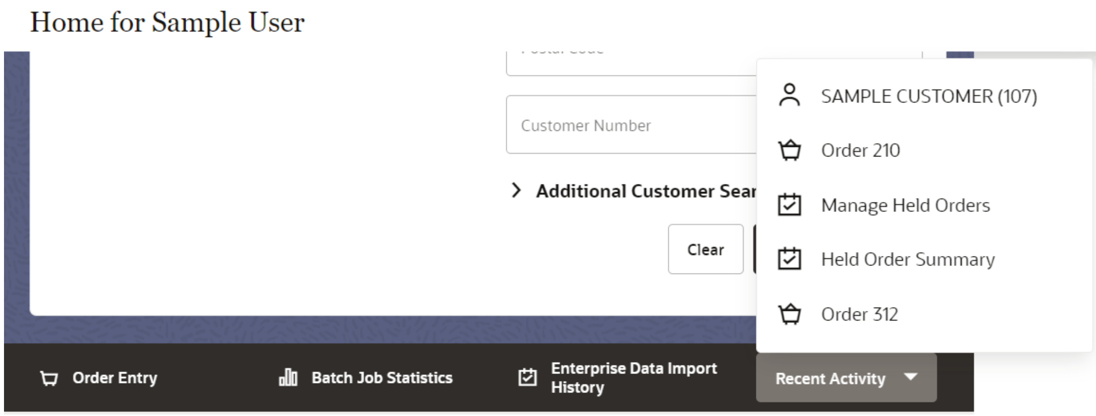
- They are included in the **Modern View Quick Link Menu** defined for your user class, if any, and
- The menu options are available in Modern View. Menu options that are available only in Classic View are not displayed. Also, sub-menus are not displayed.

Select a quick link for a menu option to open the option in a new tab.

If there are one to three quick link menu options, they are all displayed. If there are more than three quick link menu options, additional options besides the first two are available by selecting **Additional Shortcuts**.



Links to recent activity in your current session, described below, are also available from the quick link menu.



If there are no quick links defined for your user class, then just the Recent Activity is displayed.

View Recent Activity

Links to the five most recent activities in your current session are available on the **Home** page. You can click on a displayed recent activity to open the related page in a new tab. This option is available at the far right end of the bar where any Quick Links are displayed, as described above.

Only the following types of activity are tracked under **Recent Activity**:

- Viewing or updating an existing order. The order number is indicated. Select this link to advance to the *Order Summary* page for the order.
- Viewing or updating a customer. The customer name and number are indicated. Select this link to advance to the *Customer Order List* page for the customer.
- *Manage Held Orders*
- *Held Order Summary*
- *Unlock Order*
- *Sales Summary*
- *Manage External Application Access*
- *Narvar Order Export Errors*
- *Batch Job Statistics*
- *Enterprise Data Import History*
- *Payment Configurations*
- A new order created in *Order Entry*. The order number is indicated. Orders that have not yet been accepted are not listed. Select this link to advance to the *Order Summary* page for the order.

The recent activity links for the last five activities of your current session update dynamically. It is not necessary to use the **Refresh** option.

> **Note:**
>
> If you change companies or advance to Classic View, the recent activity history is cleared.

Icons in the displayed list indicate the type of activity:

: Viewing or updating a customer.

: Entering, viewing, or working with an order.

: *Sales Summary* or *Batch Job Statistics*.

: *Manage Held Orders*, *Held Order Summary*, *Unlock Order*, *Manage External Application Access*, *Narvar Order Export Errors*, *Enterprise Data Import History*, and *Payment Configurations*.

Check Gift Card Balance

Use this option to check the current balance on a gift card. This option is available only if you have authority to the **Stored Value Card Balance Inquiry (MSVB)** menu option. See *Check Gift Card Balance* for more information.

Fields on the Home Page

Purpose: The following fields display on the **Home** page.

- *Logo*
- *Announcements*
- *Summary Tiles*
  - *Sales Summary Tile*
  - *Operations Summary Tile*
  - *Held Order Summary Tile*
- *Summary Charts*
  - *Sales Today by Order Type (Percentage of Sales)*
  - *Operations Summary*
  - *Held Order Summary*
- *Search for Orders and Customers*
- *Quick Link Menu*
- *Recent Activity*
- *Gift Card Balance*

> **Note:**
>
> The information displayed on this page does not update automatically. Click **Refresh** on the upper right to update the displayed information.

For more information:

- *Home* for an overview of the **Home** page.
- *Home Page Options* for step-by-step instructions on the actions you can perform on the **Home** page.

Logo

The `HomeLogo.jpg` is displayed in the upper right. If there is an override logo for the company you are currently working in, the company-specific image is displayed instead. In this case, the image name is `HomeLogo006.jpg`, where 6 is the current company number.

See *Image Setup for the Home Page* for more information.

Announcements

Announcements, set up through the **Work with Announcements** (WANN) menu option in Classic View, are displayed in the upper right, below the logo. Up to three announcement lines are displayed, without line breaks.

Summary Tiles

Required authority: Each of the summary tiles is displayed only if you have ALLOW authority to the related menu option:

- Sales Summary tile: Requires ALLOW authority to the Sales Summary (DSSS) option.
- Operations Summary tile: Requires ALLOW authority to the Display Order Control Summary (FLSH) option.
- Held Order Summary tile: Requires ALLOW authority to the Display Held Order Summary (DHOS) option.

If you do not have the required authority:

- If you do not have the required authority to one or two of the menu options, the related tiles are not displayed at the Home page. Only the tile(s) that you have authority to will be displayed.
- If you do not have the required authority to any of the tiles, then the *Summary Charts* is displayed instead.

Sales Summary Tile

- **Merchandise Value:** The total merchandise value for the current date. See the *Sales Summary Calculations* for a discussion on how the total merchandise value is calculated.
- **Currency:** Set to the **Local Currency (A55).** All merchandise values are displayed in this currency. See this system control value in the Classic View online help for more information on currency, and how orders amounts in different currencies are converted to the local currency.

- **This month:** The total merchandise value for the current month to date. See the *Sales Summary Calculations* for a discussion on how the total merchandise value is calculated.

Operations Summary Tile

- **Entered Value:** The merchandise value of order lines that were entered or created on the current date.
  - This total includes the value of each order line entered on the current date, regardless of the original order date.
  - This total also includes items added to the order as part of an exchange.
  - This total also includes units added to an existing order line that was originally created on a prior date.
  - This total is also decreased when you apply a post-shipment discount.
  - Cancellations that take place using a cancel reason flagged to **Reduce demand** are subtracted from the **Entered** totals. For example, you might use a cancel reason flagged to reduce demand if the order line was created through an error, and the customer did not actually want to order the item.
- **Currency:** Set to the **Local Currency (A55).** See this system control value in the Classic View online help for more information on currency, and how orders amounts in different currencies are converted to the local currency.
- **Average Value:** The total **Merchandise Value** divided by the total number of units related to the activity on the current date. For example, if the total **Merchandise Value** entered so far today is 5,000 for a total of 200 units, the **Average Value** is 25.00.

Held Order Summary Tile

- **Merchandise Value:** The total current merchandise value for all currently held orders. This total is the same as the total displayed in the All tile at the *Manage Held Orders* page when no filters are applied.
- **Currency:** Set to the **Local Currency (A55).** See this system control value in the Classic View online help for more information on currency, and how orders amounts in different currencies are converted to the local currency.
- **Orders:** The total number of held orders. Orders with multiple ship-tos increase the count by just one.

Summary Charts

Each of the summary charts described below are displayed when you highlight the related summary tile, and only if you have authority to the related menu options, as described above under *Summary Tiles*.

Sales Today by Order Type (Percentage of Sales)

The bar charts illustrates the percentage of merchandise value shipped for each order type. Only order types that have had sales activity on the current date are illustrated.

If a particular order type made up less than 1% of the merchandise value shipped, it is not displayed in a bar chart.

The percentage each order type represents in the total merchandise value of sales for current date is displayed. Percentages listed are rounded to whole numbers.

Operations Summary

The bar charts illustrate the following totals:

- **Unit Count:** Indicates the percentage represented by each tracked activity in the total number of **units** for all tracked activities (entered, canceled, sold out, shipped, exchanged, or returned).

For example, there has been a total of 300 units involved in activities so far today, including:

- 150 units entered on order lines
- 20 units canceled on order lines
- 10 units sold out on order lines
- 100 units shipped on order lines
- 20 units returned on order lines

  For a total of 300 units.

  The 150 units entered represent 50% of the unit count so far for the current date. When you position your cursor over the **Entered** portion of the bar chart, a window displays:

  – Status: Entered

  – Percent of Activity: 50

  The percentage is rounded to the nearest tenth. For example, 42.857 is rounded to 42.9, and 57.142 is rounded to 57.1.

- **Order Count:** Indicates the percentage represented by each tracked activity in the total number of **orders** for all tracked activities. Only activities that affect the entire order are tracked in the order count, regardless of whether other activities have taken place related to the lines on the order. However, based on the setting of the *Order Control Summary Shipment Update Method (I55)*, activities that create invoice records (**shipments and returns**) can also be included in the order count, regardless of whether the status of the order itself has changed.

  For example, so far today:

  – 130 orders were entered

  – 50 orders had shipments, including partial shipments

  – 30 orders had returns, including partial returns

  For a total of 210 orders entered.

  The orders entered represent approximately 61.9% of the total. When you position your cursor over the **Entered** portion of the bar chart, a window displays:

  – Status: Entered

  – Percent of Activity: 61.9

  The percentage is rounded to the nearest tenth. For example, 42.857 is rounded to 42.9, and 57.142 is rounded to 57.1.

  Multi-recipient orders: Each ship-to on a multi-recipient order increases the total order count by one. For example, when you create an order that includes two additional recipients, it increases the total by three.

- **Merchandise Value:** Indicates the percentage represented by each tracked activity in total merchandise value. For example, the total merchandise value across all activities so far today is $2300, including:
  - $800 entered
  - $200 canceled
  - $100 sold out
  - $1000 shipped
  - $200 returned

  The merchandise value of orders entered represents 34.87% of the total. When you position your cursor over the **Entered** portion of the bar chart, a window displays:
  - Status: Entered
  - Percent of Activity: 34.9

  The percentage is rounded to the nearest tenth. For example, 42.857 is rounded to 42.9, and 57.142 is rounded to 57.1.

  The percentage of each of the following activities are displayed in a different color. Position your cursor over each activity to display the percentage that the activity represents of the total count or value, broken out to 2 decimal positions.

Possible activities are:

- **Entered:** Order lines that were entered or created on the current date.

  This total increases for each order line entered on the current date, regardless of the original order date.

  This total also includes items added to the order as part of an exchange.

  Cancellations that take place using a cancel reason flagged to **Reduce demand** are subtracted from the **Entered** totals. For example, you might use a cancel reason flagged to reduce demand if the order line was created through an error, and the customer did not actually want to order the item.
- **Cancelled:** Order lines that were canceled on the current date. A cancellation increases this total, rather than decreasing the **Entered** total, when the cancellation reason used is not flagged to **Reduce demand**.
- **Exchanged:** Order lines that were exchanged on the current date.
- **Soldout:** Tracks the merchandise value of order lines that were sold out on the current date.
- **Shipped:** Order lines that were shipped and billed on the current date.

> **Note:**
>
> The *Order Control Summary Shipment Update Method (I55)* system control value defines how to update the **Shipped** totals.

- **Returned:** Order lines that were returned on the current date.

Activity date vs. order date: The totals are based on activities that took place on the current date, regardless of when the order was created. For example, an order was created on April 1, and an order line was added today, April 9. The order line's merchandise total is included in today's totals.

If a particular activity has not taken place for the current date, it is not included in the bar chart.

Held Order Summary

About the Y (Vertical) Axis: The Y axis displays a scale to illustrate the total number of held orders by hold reason. The scale is proportional to the largest number of orders held for each reason. For example, if the hold reason with the largest number of orders includes 83 orders, the **Orders** scale goes from 0 to 100 by tens.

For each hold reason:

- The hold reasons are listed in alphabetical order based on the *Hold Reason* descriptions, and the descriptions are displayed vertically if there is not enough space to display them horizontally; in this case, the descriptions may be truncated.
- **Bar indicating total number of orders:** The height of the bar displayed for the hold reason is proportional based on the number of orders currently held for that reason.

Hold reasons not displayed: The following types of hold reasons are not displayed:

- Ship-to hold reasons, such as ship-to fraud. These orders are included under the ship-to only hold reason.
- Pay type holds applied by the system, including the waiting credit-card authorization hold (CW hold).

Position your cursor over the bar for the hold reason to display:

- The *Hold Reason* description.
- The total number of orders assigned that hold reason. Orders with multiple ship-tos increase the total by 1, not by the number of ship-tos. User-assigned holds, identified by (User Hold), are listed separately from system-assigned hold if the hold has been applied both by the system and by a user.

If multiple hold reasons applied to an order: An order can have multiple hold reasons applied, and in this case it is included in the total order count and merchandise value for each hold reason. For example, an order is on a time hold, and a user hold has also been applied. The order is included in the totals for both hold reasons.

Search for Orders and Customers

See *Search for Orders or Customers* for more information.

Quick Link Menu

Menu options are available at the bottom of the **Home** page if:

- They are included in the **Modern View Quick Link Menu** defined for your user class, if any.
- The menu options are available in Modern View. Menu options that are available only in Classic View are not displayed. Also, sub-menus are not displayed.

Click any of the menu option links to open the related page.

See *Use Quick Links* for more information.

Recent Activity

Links to the five most recent activities in your current session are available. See *View Recent Activity*.

Gift Card Balance

See *Fields on Check Gift Card Balance*.

6 Select Company

Purpose: A company is a single, isolated set of tables and data representing an organization of financial information, inventory, and customers. Essentially, a company has a completely separate database from other companies.

Use the **Select Company** window to select the company whose data you wish to work with in Modern View. This window displays only companies to which your user ID has authority at the user or user class level.

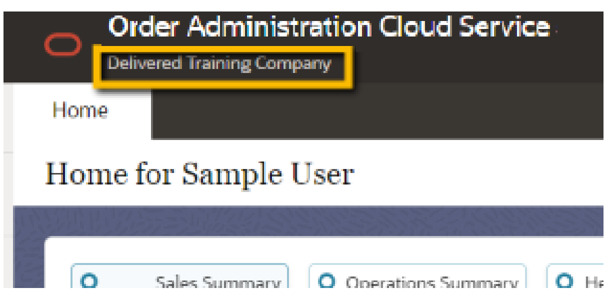
When you select a different company, you return to the Home page. Any other pages you had open close automatically.

If you have authority to only one company, you cannot advance to this window.

> **Note:**
>
> You can define company authority for a user ID in the **Work with Users (WUSR)** menu option. You can define company authority for a user class in the **Work with User Classes (WUCL)** menu option.

How to display:

- The system automatically advances you to this window when you *Advance to Modern View* if Modern View at Initial Login is selected and you have authority to more than one company and you do not have a default company defined for your user ID.
- Click the name of the currently selected company in the header of any page.



This window displays companies in ascending sequence by company code.

> **Note:**
>
> The change in company is not retained when you return to *Classic View*.

For more information:

- *Select Company Options* for step-by-step instructions on the actions you can perform on the **Select Company** window.
- *Fields on Select Company* for a description of the fields on the **Select Company** window.

Select Company Options

Purpose: You can perform the following actions on the **Select Company** window.

- *Select a Company*
- *Sort Companies*
- *Filter Companies*

For more information:

- *Select Company* for an overview of the **Select Company** window.
- *Fields on Select Company* for a description of the fields on the **Select Company** window.

Select a Company

Select the *Company Code* link for the company whose data you wish to work with. The window only displays companies that you are authorized to work in.

The information on the **Search for Orders or Customers** page displays the information for the newly selected company. In addition, the system:

- Closes all currently open tabs.
- Loads all data for the newly selected company.
- Reloads secured feature assignment for your user ID.

> **Note:**
>
> The change in company is not retained when you return to *Classic View*.

Sort Companies

You can sort on any column in the **Select Company** window by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Companies first display on this window in ascending company code sequence.

Filter Companies

The *Select Company* window displays the first 5 companies to which you have authority, excluding the current company.

The window provides an entry field below the **Select Company** panel. You can further refine the companies displayed by entering one or more search terms found in either of the *Fields on Select Company*.

Example: Enter `test`. The displayed companies include only those whose description includes “test.” Next, enter `10`. Displayed results are now further restricted to companies that include “10” in either the company code or description, and that include “test” in the description.

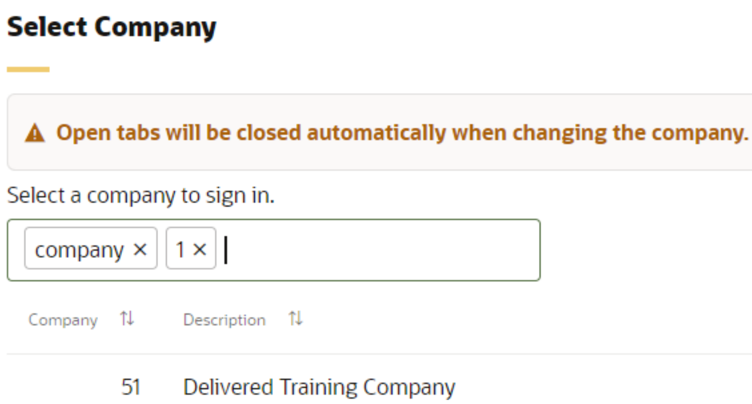
Matching records need to contain the search term, but do not need to start with the search term. For example, both `110` and `010` are matches for a search term of `10`.

Filtering is across all results: The filtering is not restricted to the companies displayed on the first page of results. For example, if the only company matching your entry is on the second page of results, this company is displayed.

Additional information on filtering:

- Only fields displayed at the *Fields on Select Company* are available for filtering. For example, you cannot filter based on the company address.
- Filtering is not case-sensitive. For example, you can enter `test` or `TEST` to match a company that includes the word “Test” in its description.

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.



Fields on Select Company

Purpose: The following information displays for each company to which your user ID has authority at the user or user class level. If you advanced to the **Select Company** window from the *Search for Orders or Customers* page, the company you are currently in does not display.

Companies first display on this window in ascending company code sequence.

- **Company** (*Company Code*)
- **Description** (*Company Description*)

For more information:

- *Select Company* for an overview of the **Select Company** window.
- *Select Company Options* for step-by-step instructions on the actions you can perform on the **Select Company** window.

7

Preferences

Purpose: Use the **Preferences** window to define user display settings in the application such as:

- The size, or height, of the font in the application. The default setting is 100%.
- Whether a *Snackbar Notification* is automatically cleared by the system, and if so, the number of seconds to display the message before it disappears. The default setting is to auto-dismiss system messages after 5 seconds.

How to display: Select **Preferences** from the **User ID** drop down box in the header of any page.

For more information:

- *Preferences Options* for step-by-step instructions on the actions you can perform on the **Preferences** window.
- *Fields on Preferences* for a description of the fields on the **Preferences** window.

Preferences Options

Purpose: You can perform the following actions on the **Preferences** window.

- *Update Display (Font Size Percent)*
- *Update Snackbar Notifications Settings*

For more information:

- *Preferences* for an overview of the **Preferences** window.
- *Fields on Preferences* for a description of the fields on the **Preferences** window.

Update Display (Font Size Percent)

1. Use the up or down arrow in the *Display* field to increase or decrease font size, or enter the preferred font percentage. The current font size is indicated.
2. Select the **Update** option. The system returns you to the previous page and displays a message indicating the preferences have been updated. The font size will remain at your user setting until you manually change it.

Update Snackbar Notifications Settings

1. Define the **Enable Auto-Dismiss** setting.
   - Select the **Enable Auto-Dismiss** field to have the system automatically clear a message notification box after the number of seconds defined in the **Time Before Auto-Dismiss** field.
   - Deselect the **Enable Auto-Dismiss** field to retain a message notification box until you manually close the box, regardless of the setting of the **Time Before Auto-Dismiss** field.

- If the **Enable Auto-Dismiss** setting is enabled, use the up or down arrow to increase or decrease the number of seconds that the system displays a message notification box before it disappears in the **Time Before Auto-Dismiss** field, or enter the number of seconds.
- Select the **Update** option. The system returns you to the previous page and displays a message indicating the preferences have been updated. The snackbar notifications settings will remain at your user setting until you manually change it.

Fields on Preferences

Purpose: The following information displays on the **Preferences** window.

Display Preferences

- *Display*

Snackbar Notifications Preferences

- **Enable Auto-Dismiss**:
  - **Selected** = The system automatically clears a message notification box after the number of seconds defined in the **Time Before Auto-Dismiss** field.
  - **Deselected** = The system does not automatically clear a message notification box; you must manually close the message notification box.
- **Time Before Auto-Dismiss (Seconds)**: When the **Enable Auto-Dismiss** field is selected, this is the number of seconds the system displays a message notification box before it disappears.

For more information:

- *Preferences* for an overview of the **Preferences** window.
- *Preferences Options* for step-by-step instructions on the actions you can perform on the **Preferences** window.

8 Sales Summary

Purpose: Use the **Sales Summary** page to review the total merchandise value, number of invoices, and average invoice amount billed for the current day, week, or month.

Totals are displayed in tiles at the top of the page, and are broken out by order type below, with bar charts illustrating the percentages of merchandise value billed for each order type. If your company supports fulfilling orders through integration with Order Orchestration, totals are broken out by delivery type as well, including store pickup, delivery, retail pickup, and ship-for-pickup. Orders that originated in Order Administration and shipped to the customer are listed as direct delivery.

How to display: Select **Sales Summary** from a menu or from the *View Recent Activity* list at the **Home** page, or highlight the **Sales Summary** tile at the *Home* page and select **View Report**.

- ALLOW authority to the Sales Summary (DSSS) menu option is required for access to this page.
- The totals displayed on this page may be different from those displayed in the Sales Summary option in Classic View.

Sales Summary Calculations

Which invoices are included? The totals displayed on this screen include Invoice Ship To records for regular (debit) invoices and their merchandise totals only. This screen does **not** include:

- Returns, credits, or discounts applied after shipment.
- Freight, tax, handling, or other charges.
- Any invoice with a merchandise total of $0.00.
- If an order originated in Order Administration, was submitted to Order Orchestration for fulfillment assignment, and Order Orchestration assigned it back to Order Administration to ship from the warehouse, only the originating order is included. This situation can occur if **Use OROB for Fulfillment Assignment (M31)** is selected.

How is the invoice date determined? This screen organizes sales totals based on the **Invoice date** from the Invoice Ship To record. This date is from the **Start** date from the BILL_ASYNC job if the **Use Async Start Date for Billing Transactions (E95)** system control value is selected. If the background jobs are running using a previous date because they are not stopped and restarted daily, then the invoices billed today are included under that previous date, not under **Today**.

> **Note:**
>
> If an invoice has a future date, it is included in the current week and month totals, if applicable. It is possible for an invoice to have a future date if, for example, Order Orchestration passed a future shipment date in a status response message because the shipment is prepped and ready to go the next morning.

How is the number of sales calculated? The total number of sales for a period, order type, or entity is from the total number of Invoice Ship To records billed. This total:

- Excludes (is not net of) credit invoices, such as an invoice created by processing a return. For example, if you process 1000 shipments, 50 returns, and 10 discount credits after shipment, the total displayed here is still 1000.
- Does not include any invoice with a merchandise total of $0.00.

Not included at the Sales Summary page: The Sales Summary page totals also do not include a fulfilling order for the original order when **Use OROB for Fulfillment Assignment (M31)** is selected. In this scenario:

- An order originates in Order Administration.
- Order Administration submits to Order Orchestration for fulfillment.
- Order Orchestration assigns the order back to Order Administration.
- Order Administration creates an additional, fulfilling order to fulfill the original order.

How is the sales amount calculated? The total sales amount for a period, order type, or entity is from the total dollar value of merchandise billed for the period, based on actual selling price. This total:

- Excludes (is not net of) returns, credits, or discounts applied after shipment.
- Does not include freight, tax, handling, or other charges.
- Includes a two-position decimal.

For more information:

- *Sales Summary Options* for step-by-step instructions on the actions you can perform on the **Sales Summary** page.
- *Fields on Sales Summary* for a description of the fields on the **Sales Summary** page.

Sales Summary Options

Purpose: You can perform the following actions on the **Sales Summary** page.

- *Update the Displayed Data*
- *Restrict the Displayed Data Based on Entity*
- *Display Sales Summary Data for the Current Date, Week, or Month*
- *Sort the Displayed Information*
- *Display Summary Data by Order Type or Delivery Type*

> **Note:**
>
> The activity summary tiles at the top of the page are display-only.

For more information:

- *Sales Summary* for an overview of the **Sales Summary** page.

- *Fields on Sales Summary* for a description of the fields on the Sales Summary page.

Update the Displayed Data

Select **Refresh** at the upper right to update the totals displayed on this page.

Restrict the Displayed Data Based on Entity

If the current company supports multiple entities, you can select an *Entity* from the drop-down field above the same summary tiles to restrict the displayed data to that entity.

Display Sales Summary Data for the Current Date, Week, or Month

Optionally, select the **Sales Today**, **Sales This Week**, or **Sales This Month** tile to display sales totals for the selected time period in the *Sales Summary Table Fields* and *Sales Bar Chart*.

See *Sales Summary Tile Fields* for information on the contents of these tiles.

Sort the Displayed Information

Optionally, click any of the headings on the summary table to sort the table based on that column. Click again to toggle the sort between ascending or descending order.

For example, click **Unit Count** to sort the table in ascending order by unit count. Click **Unit Count** again to sort the table in descending order by unit count.

Grouping: If integration with Order Orchestration is in use, the summary table fields include sub-entries for Order Type or Delivery Type. When you sort the displayed data, the grouping of the sub-entries are retained within the main entry.

Example: For the current date there are 600 shipments on orders for the Web Order type, including 100 Direct Delivery order shipments and 300 Store Pickup order shipments. Also for the current date, there are 150 Phone Order shipments, all of them for Direct Delivery orders. The View is currently set to Order Type. When you sort in ascending order by Invoice Count, the sort is:

- Order Type: Web Order:
  - Direct Delivery: 100
  - Store Pickup: 300
- Order Type: Phone Order:
  - Direct Delivery: 150

Display Summary Data by Order Type or Delivery Type

Use the **View** option above the order summary table to toggle between displaying totals broken out by order type or by delivery type.

When this option is available, you can also:

- **If the View is set to Order Type:** Expand a displayed **Order Type** to see sale totals for each **Delivery Type** processed for the order type, for example, the sales processed for store pickup orders that originated in the Web order type.
- **If the View is set to Delivery Type:** Expand a displayed **Delivery Type** to see sale totals for each **Order Type** processing that **Delivery Type**.

This option is available only if the integration with Order Orchestration is in use, based on whether the *Use Merchandise Locator (I38)* system control value is selected.

See *Fields Displayed for Summary Table When Order Orchestration Integration is in Use* for more information.

Fields on Sales Summary

Purpose: The information displayed on the **Sales Summary** page is described below:

- *Sales Summary Tile Fields*
- *Sales Summary Table Fields*
- *Sales Bar Chart*

For more information:

- *Sales Summary* for an overview of the **Sales Summary** page.
- *Sales Summary Options* for step-by-step instructions on the actions you can perform on the **Sales Summary** page.

Entity: If the current company supports multiple entities, you can select an entity from the drop-down field above the sames summary tiles to restrict the displayed data to that entity; otherwise, this field is not displayed. All entities are displayed by default.

> **Note:**
>
> The totals displayed on this page may be different from those displayed in the Sales Summary option (DSSS) in Classic View.

Sales Summary Tile Fields

Periods: The following tiles present totals at the top of the page:

- **Sales Today**: Sales so far for the current date. Selected by default.
- **Sales This Week:** Sales so far for the current week. The current week runs from Monday through Sunday, and the totals displayed include all days so far for this period.

  Note: The calculation of totals for **This week** occurs regardless of whether a new month starts during the week.

  Example: Today is Sunday June 3. The totals displayed under **This week** include Monday May 28 through the current date.
- **Sales This Month:** Sales so far for the current month.

Values included in each tile:

- **Merchandise Value:** See the *Sales Summary Calculations* for a discussion on how the total merchandise value is calculated for the current day, week, and month.
- **Currency Code:** Set to the *Local Currency (A55).* All merchandise values are displayed in this currency. See this system control value in the Classic View online help for more information on currency, and how orders amounts in different currencies are converted to the local currency.

- **Invoice Count:** See the *Sales Summary Calculations* for a discussion on how the total number of invoices is calculated for the current day, week, and month.
- **Average Value:** The **Merchandise Value** for the day, week, or month, divided by the **Invoice Count**.

Sales Summary Table Fields

The summary table lists the sales totals for the current date, current week, or current month, based on the currently selected sales summary tile, as well as the currently selected entity, if any.

The date or date range for the currently selected tile is displayed above the table, for example: **Sales This Month (12/01/2022 - 12/31/2022)**.

Entries are broken out by order type, and you can also break them out by delivery type if the integration with Order Orchestration is in use, as described below.

Table totals: The table totals include:

- *Order Type*. Only order types that have had sales activity in the selected period are included in the summary table.
- **Invoice Count:** The total number of shipments billed with merchandise amounts greater than zero for the displayed time period. See *Sales Summary Calculations* for more information, and see the *Consolidated Invoice (B49)* system control value in the Classic View online help for a discussion on the factors that control how many invoices are generated for orders that include multiple shipments on the same day.

  Important: In Order Management System 21.0 or higher, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.
- **Merchandise Value:** The total merchandise value shipped. See *Sales Summary Calculations* for more information.
- **Average Value:** The Merchandise Value divided by the Invoice Count.

Fields Displayed for Summary Table When Order Orchestration Integration is in Use

When integration with Order Orchestration is in use, based on whether the *Use Merchandise Locator (I38)* system control value is selected, you can toggle between displaying sales totals broken out by order type or delivery type by using the **View** option above the sales summary table.

- *Order Type*: Selected by default. When **Order Type** is selected in the **View** option at the top of the summary table, the first column in the summary table is **Order Type**, and you can expand each order type to display each **Delivery Type** billed for the order type on the current day, week, or month. Only order types that have had sales activity in the selected period are included in the summary table.

  For example, an **Order Type** of **WEB ORDER (W)** is displayed, where W is the order type code. You can expand **WEB ORDER (W)** to display **Ship for Pickup (S)** and **Direct Delivery** which shipped during the current time period.

  Order type codes and descriptions are defined through the Work with Order Type (WOTY) menu option in Classic View.

- *Delivery Type*: When **Delivery Type** is selected in the **View** option at the top of the summary table, the first column in the summary table is **Delivery Type**, and you can expand each delivery type to display each Order Type billed for the delivery type on the current day, week, or month.

For example, a **Delivery Type** of **Ship for Pickup** is displayed. You can expand **Ship for Pickup** to display order types of **PHONE ORDER (P)** and **WEB ORDER (W),** which shipped during the current time period.

Only delivery types that have had sales activity in the selected period are included in the summary table.

Sales Bar Chart

Sales This Day, Week, or Month by Order Type: The bar charts displayed next to the summary table illustrate the percentage of merchandise value shipped for each order type or delivery type, based on the settings currently selected in the summary table. Only order types or delivery types that have had sales activity in the selected period are illustrated.

If a particular order type or delivery type made up less than 1% of the merchandise value shipped, it is not displayed in a bar chart.

Position your cursor over a bar chart to display the percentage it represents in the total merchandise value of sales for the selected period. Percentages listed are rounded to whole numbers.

Sales This Day, Week, or Month by Delivery Type: If integration with Order Orchestration is in use and the **View** is currently set to **Delivery Type**, the bar charts illustrate the percentage of merchandise value shipped for each delivery type. See *Fields Displayed for Summary Table When Order Orchestration Integration is in Use* for background.

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Operations Summary

Purpose: Use the **Operations Summary** page to review the totals for each activity that has taken place on the current date. The activities tracked are the number of orders, number of units, and merchandise value for items on orders that have had the following activities occur on the current date:

- Entered
- Canceled
- Exchanged
- Soldout
- Shipped
- Returned

Classic View option: The Display Order Control Summary option (FLSH) in Classic View displays much of the same information as the Operations Summary page in Modern View, excluding the average calculations and bar charts. See the Classic View online help for more information.

How to display: Select **Operations Summary** from a menu, or highlight the **Operations Summary** tile at the *Home* page and select **View Report**.

> **Note:**
>
> ALLOW authority to the Display Order Control Summary (FLSH) menu option is required for access to this page.

For more information:

- *Operations Summary Options* for step-by-step instructions on the actions you can perform on the **Operations Summary** page.
- *Fields on Operations Summary* for a description of the fields on the **Operations Summary** page.

Operations Summary Options

Purpose: You can perform the following actions on the **Operations Summary** page.

- *Display the Percentages for a Status in the Bar Charts*
- *Sort the Entries in the Summary Table*
- *Update the Displayed Data*

> **Note:**
>
> The activity summary tiles at the top of the page are display-only.

For more information:

- *Operations Summary* for an overview of the **Operations Summary** page.
- *Fields on Operations Summary* for a description of the fields on the **Operations Summary** page.

Display the Percentages for a Status in the Bar Charts

Optionally, position your cursor over a segment of a bar chart to display the percentage that the activity represents for the day's total. For example, position your cursor over the Entered activity in the Order Count bar chart to display the percentage of the day's activity represented by entry of orders.

Sort the Entries in the Summary Table

Optionally, click any of the headings on the summary table to sort the table based on that column. Click again to toggle the sort between ascending or descending order.

For example, click **Unit Count** to sort the table in ascending order by unit count. Click **Unit Count** again to sort the table in descending order by unit count.

Update the Displayed Data

Select **Refresh** at the upper right to update the totals displayed on this page.

Fields on Operations Summary

Purpose: The following information displays on the **Operations Summary** page:

- *Activity Summary Tile Fields*
- *Tracked Activities*
- *Fields on Each Tile*
- *Bar Chart Fields*
- *Summary Table Fields*

Also, see the *Order Control Summary Shipment Update Method (I55)* for more information on how shipment totals are updated.

For more information:

- *Operations Summary* for an overview of the **Operations Summary** page.
- *Operations Summary Options* for step-by-step instructions on the actions you can perform on the **Operations Summary** page.

Activity Summary Tile Fields

Tracked Activities

The following activities for the current date are each tracked in a separate tile:

- **Entered:** Tracks the merchandise value of order lines that were entered or created on the current date.
  - This total increases for each order line entered on the current date, regardless of the original order date.
  - This total also includes items added to the order as part of an exchange.
  - This total also includes units added to an existing order line that was originally created on a prior date.
  - This total is also decreased when you apply a post-shipment discount.
  - Cancellations that take place using a cancel reason flagged to **Reduce demand** are subtracted from the **Entered** totals. For example, you might use a cancel reason flagged to reduce demand if the order line was created through an error, and the customer did not actually want to order the item.
- **Cancelled:** Tracks the merchandise value of order lines that were canceled on the current date. A cancellation increases this total, rather than decreasing the **Entered** total, when the cancellation reason used is not flagged to **Reduce demand**.
- **Exchanged:** Tracks the merchandise value of order lines that were exchanged on the current date.
- **Soldout:** Tracks the merchandise value of order lines that were sold out on the current date.
- **Shipped:** Tracks the merchandise value of order lines that were shipped and billed on the current date.

> **Note:**
>
> The *Order Control Summary Shipment Update Method (I55)* system control value defines how to update the **Shipped** totals. See below for more information.

- **Returned:** Tracks the merchandise value of order lines that were returned on the current date.

Activity date vs. order date: The totals are based on activities that took place on the current date, regardless of when the order was created. For example, an order was created on April 2, and an order line was added on April 9. The order line's merchandise total is included on April 9.

Excluded from totals: Retail pickup and delivery orders that fulfill orders originating in Order Administration and submitted to Order Orchestration for assignment are excluded from these totals. These are orders whose *Alternate Order Number* indicates an originating order number, and whose *Broker Delivery Type* is Delivery or Retail Pickup.

> **Note:**
>
> If there is a very large difference between the totals in the tiles, the tile with the much smaller value might be displayed based on a percentage of the largest total. For example, if the total merchandise value is over 200 billion, and a smaller total is less than 0.1% of a billion, then the total displayed for the smaller might be displayed as 0.0B.

Fields on Each Tile

Each activity tile displays the following totals:

- **Merchandise Value**: The total merchandise amount related to the activity on the current date. For example, indicates the total merchandise value of order lines created, canceled, or exchanged on the current date. See:
  - *Entered (Merchandise Value)*
  - *Cancelled (Merchandise Value)*
  - *Exchanged (Merchandise Value)*
  - *Soldout (Merchandise Value)*
  - *Shipped (Merchandise Value)*
  - *Returned (Merchandise Value)*
- **Currency:** From the *Local Currency Code (A55)* system control value. All merchandise values are displayed in this currency. See this system control value in the Classic View online help for more information on currency, and how orders amounts in different currencies are converted to the local currency.
- **Average Value:** The total **Merchandise Value** divided by the total number of units related to the activity on the current date. For example, if the total **Merchandise Value** entered so far today is 5,000 for a total of 200 units, the **Average Value** is 25.00.

Bar Chart Fields

Each bar chart illustrates the percentage that each activity represents in the total of the following for the current date:

- **Unit Count:** Indicates the percentage represented by each tracked activity in the total number of **units** for all tracked activities.

  For example, there has been a total of 300 units involved in activities so far today, including:
  - 150 units entered on order lines
  - 20 units canceled on order lines
  - 10 units sold out on order lines
  - 100 units shipped on order lines
  - 20 units returned on order lines

  The units entered represent 50.00% of the unit count so far for the current date. When you position your cursor over the **Entered** portion of the bar chart, a window displays:

- Status: Entered
- Percent of Activity: 50.00

- **Order Count:** Indicates the percentage represented by each tracked activity in the total number of **orders** for all tracked activities. Only activities that affect the entire order are tracked in the order count, regardless of whether other activities have taken place related to the lines on the order. However, based on the setting of the *Order Control Summary Shipment Update Method (I55)*, activities that create invoice records (**shipments and returns**) can also be included in the order count, regardless of whether the status of the order itself has changed.

  For example, so far today:

  - 40 orders were entered
  - 10 orders had shipments, including partial shipments
  - 10 orders had returns, including partial returns

  The orders entered represent 66.67%, or two thirds of the orders included in the total. When you position your cursor over the **Entered** portion of the bar chart, a window displays:

  - Status: Entered
  - Percent of Activity: 66.67

  Multi-recipient orders: Each ship-to on a multi-recipient order increases the total order count. For example, when you create an order that includes two additional recipients, it increases the total by three.

- **Merchandise Value:** Indicates the percentage represented by each tracked activity in total merchandise value. For example, the total merchandise value across all activities so far today is $2300, including:

  - $800 entered
  - $200 canceled
  - $100 sold out
  - $1000 shipped
  - $200 returned

  The merchandise value of orders entered represents 34.87% of the total. When you position your cursor over the **Entered** portion of the bar chart, a window displays:

  - Status: Entered
  - Percent of Activity: 34.87

The percentage of each of the following activities are displayed in a different color. Position your cursor over each activity to display the percentage that the activity represents of the total count or value, broken out to 2 decimal positions. See *Activity Summary Tile Fields*, above, for a list of the possible activities.

If a particular activity has not taken place for the current date, it is not included in the bar chart.

Summary Table Fields

The summary table lists the following totals for each activity for the current date:

- **Unit Count.** See:

  - *Entered (Unit Count)*
  - *Cancelled (Unit Count)*
  - *Exchanged (Unit Count)*
  - *Soldout (Unit Count)*
  - *Shipped (Unit Count)*
  - *Returned (Unit Count)*
- **Order Count.** See:
  - *Entered (Order Count)*
  - *Cancelled (Order Count)*
  - *Exchanged (Order Count)*
  - *Soldout (Order Count)*
  - *Shipped (Order Count)*
  - *Returned (Order Count)*
- **Merchandise Value:** Displayed as whole numbers without decimals. See:
  - *Entered (Merchandise Value)*
  - *Cancelled (Merchandise Value)*
  - *Exchanged (Merchandise Value)*
  - *Soldout (Merchandise Value)*
  - *Shipped (Merchandise Value)*
  - *Returned (Order Count)*

All possible activities are listed in the summary table, regardless of whether the activity has taken place on the current date. If the activity has not taken place on the current date, the totals listed are zero.

Order Control Summary Shipment Update Method (I55)

This system control value defines how to update shipment totals for the Order Control Summary table, displayed on the Operations Control Summary page. Possible settings for this system control value are ORDERS, INVOICES, and PICKS. Each is described below.

ORDERS

When the *Order Control Summary Shipment Update Method (I55)* system control value is set to **ORDERS** or blank, the Billing Async updates the **# Orders shipped** field when the status of an order changes to closed.

The **Orders shipped** total includes:

- Shipped orders, including drop ship orders, confirmed; the system does not update the **# Orders shipped** until all of the units on the order are confirmed, soldout, or cancelled.

  A single order with multiple pick slips (for example, for ship alone items) updates the **# Orders shipped** by 1.

  An order with multiple recipients updates the **# Orders shipped** by the number of recipients. For example, an order with 2 ship-to customers updates the total by 2.

- Orders which include only non-inventory items, membership items, or virtual stored value card items; the system updates the total once the order is processed through billing.
- Express bill orders.

The **Orders shipped** total does not include:

- Orders which include only soldout items.
- Returns processed as negative quantities in order entry. **Note:** If the order also includes a regular item, the system includes the order in the **Orders shipped** total once all of the regular items on the order are confirmed.

INVOICES

When the *Order Control Summary Shipment Update Method (I55)* system control value is set to **INVOICES**, the system updates the **# Orders shipped** field when the Billing Async creates an invoice for an order, excluding credit invoices.

The **Orders shipped** total includes:

- Invoices for an order, excluding credit invoices.
  - A single order with multiple invoices updates the **# Orders shipped** by the number of invoices created. For example, an order with 2 invoices updates the total by 2.
  - An order with multiple recipients updates the **# Orders shipped** by the number of invoices created for each ship to. For example, an order with 2 ship-to customers, each ship to containing 2 invoices, updates the total by 4.
  - If you use *Consolidated Invoice (B49)*, the system counts a consolidated invoice as one invoice, regardless of how many separate shipments are processed through billing.

Important: In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

- Express bill orders and drop ship orders since an invoice is still created.
- Orders which include only non-inventory items, membership items or virtual stored value card items since an invoice is still created.

The **Orders shipped** total does not include:

- Orders which include only soldout items since an invoice is never created.
- Returns processed as negative quantities in order entry, since the invoice created is a credit. **Note:** If the order also includes a regular item, the system includes the order in the **Orders shipped** total once an invoice is created for the regular item.

PICKS

When the *Order Control Summary Shipment Update Method (I55)* system control value is set to **PICKS**, the system updates the **# Orders shipped** field when the Billing Async processes a pick control number for an order.

The **Orders shipped** total includes:

- Pick control numbers confirmed for an order.

  A single order with multiple pick control numbers updates the **# Orders shipped** by the number of pick control numbers confirmed through billing. For example, a pick was generated for a ship alone item and another pick was generated for all other items. The system generates a separate pick control number whenever an order is split into several pick slips.

An order with multiple recipients updates the **# Orders shipped** by the number of pick control numbers generated and confirmed for each ship to. For example, an order with 2 ship-to customers, each ship to has 2 pick control numbers confirmed, updates the total by 4.

- Orders which include only non-inventory items or drop ship items on drop ship picks, since a pick control number is still generated.

The **Orders shipped** total does not include:

- Pick labels that are scanned and sent to billing since they do not contain any detail lines.
- Express bill orders since a pick control number is not generated.
- Returns processed as negative quantities in order entry since a pick control number is not generated. **Note:** If the order also includes any regular item, the system includes the order in the **Orders shipped** total once the pick control number(s) associated with the regular item(s) is processed by billing.

Orders which include only sold out items, membership items, drop ship items on drop ship purchase orders, or virtual stored value card items since a pick control number is not generated.

10
Held Order Summary

Overview: Use the **Held Order Summary** page to review total orders and current merchandise values for all ship-tos on held orders, broken out by hold reason. You can review the totals in graph or tabular form.

From this page, you can also advance to the *Manage Held Orders* page, where you can review totals for held orders for a particular hold reason code broken out by time period, and display a list of individual orders that are available for review and maintenance.

How to display: Select **Held Order Summary** from a menu, or highlight the **Held Order Summary** tile at the *Home* page and select **View Report**.

Graph or table view: The **Held Order Summary** page loads initially in *Graph View*, and you can switch to *Table View*.

Required authority: To advance to this page, you need **ALLOW** or **DISPLAY** authority to the DHOS menu option. See **Setting Up Menu Options (WOPT)** in the Classic View online help for background.

If multiple hold reasons applied to an order: An order can have multiple hold reasons applied, and in this case it is included in the total order count and merchandise value for each hold reason. For example, an order is on a pay type hold applied by the system, and a user hold has also been applied. The order is included in the totals for both hold reasons.

Differences from Classic View: The **Held Order Summary** page in Modern View differs from the Held Order Summary (DHOS) menu option in Classic View:

- In Modern View, the totals update when you open the Held Order Summary page, or when you click **Refresh**. In Classic View, you need to select **Submit Update**.
- In Modern View, the total amounts include the open merchandise value only. In Classic View, the totals include tax, freight, additional freight, handling, duty, and additional charges.

In this topic:

- *Graph View*
- *Table View*

For more information:

- *Held Order Summary Options* for step-by-step instructions on the actions you can perform on the **Held Order Summary** page.
- *Fields on Held Order Summary* for a description of the fields on the **Held Order Summary** page.

Graph View

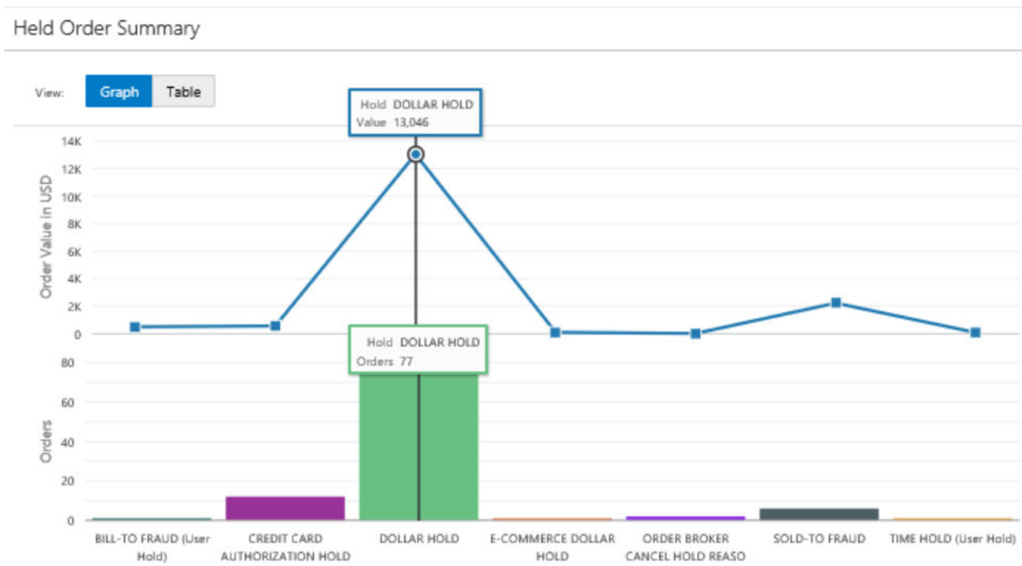
The **Held Order Summary** page loads to graph view by default.

Vertical axis: The vertical axis displays two scales:

- The number of orders that are on hold for each hold reason. These totals are illustrated by bars.
- The total open merchandise value of orders that are on hold for each hold reason. These totals are indicated by a line running between each hold reason total.

Scales in the vertical axis: The scales are based on the largest number for each of these totals. For example:

- if the hold reason applied to the largest number of orders is applied to 79 orders, the scale includes 20, 40, 60, and 80 increments to illustrate the relative size of each total.
- If the hold reason applied to the orders with the largest merchandise balance is 13,000, the scale includes increments from 0 to 14K to illustrate the relative value of each total.

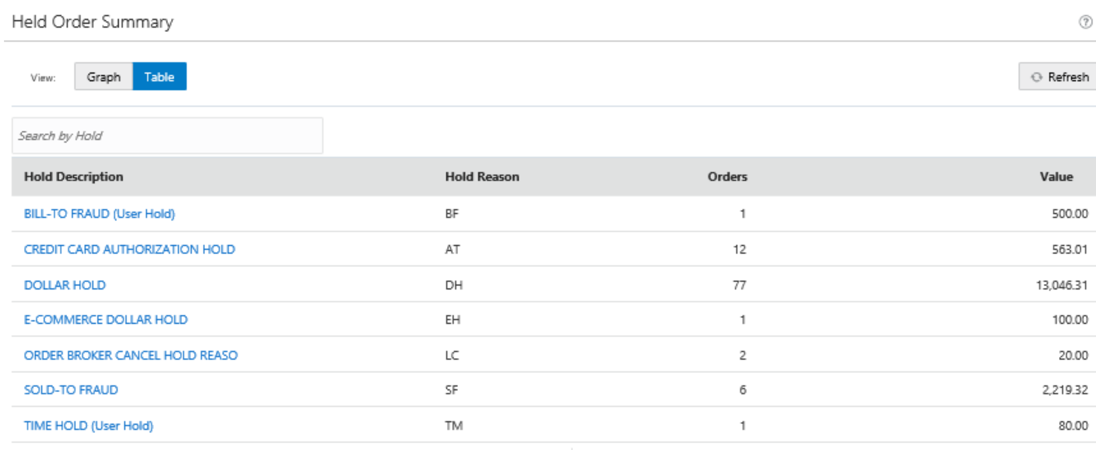


Horizontal axis: The horizontal axis displays the description of each hold reason code. The descriptions are displayed vertically if necessary to fit them all on the page.

More information on each hold reason: Position the mouse over a hold illustration for a hold reason code to display the total open merchandise value and number of orders, as illustrated above. You can click the bar representing the hold reason to display a link to the *Manage Held Orders* page, filtered to display the order assigned the selected hold reason.

Table View

Switch to **Table View** at the **Held Order Summary** page to display a table listing the total number of orders and total open merchandise value for each hold reason.



Hold Description	Hold Reason	Orders	Value
BILL-TO FRAUD (User Hold)	BF	1	500.00
CREDIT CARD AUTHORIZATION HOLD	AT	12	563.01
DOLLAR HOLD	DH	77	13,046.31
E-COMMERCE DOLLAR HOLD	EH	1	100.00
ORDER BROKER CANCEL HOLD REASO	LC	2	20.00
SOLD-TO FRAUD	SF	6	2,219.32
TIME HOLD (User Hold)	TM	1	80.00

The Table View displays the same information as the Graph View, but in tabular form, and also provides links to the *Manage Held Orders* page, filtered to display the order assigned a selected hold reason. See *Graph View*, above, for a discussion.

Held Order Summary Options

Purpose: You can perform the following actions on the **Held Order Summary** page.

Graph view or Table view: Graph view is automatically selected when you first advance to this page. Optionally:

- Click **Table** to switch from Graph view to Table view.
- Click **Graph** to switch from Table view to Graph view.

Refresh the currently displayed held order totals: Click **Refresh** in the upper right to update the information displayed on the page.

In this topic:

- *Graph View Options*
- *Table View Options*

For more information:

- *Held Order Summary* for an overview of the **Held Order Summary** page.
- *Fields on Held Order Summary* for a description of the fields on the **Held Order Summary** page.

Graph View Options

Display more information on a hold reason: To display the exact number of orders on hold, the total open merchandise value of those orders for each hold reason, move the cursor over the hold reason. The page also displays the full hold reason description.

Advance to the Manage Held Orders page:

- Click on the bar chart for a hold reason to display the **View Holds** option.
- Click **View Holds** to advance to the *Manage Held Orders* page.

At this page, you can review more information on orders assigned that hold reason, further filter the displayed orders, generate the Held Orders report, or advance to pages where you can work with the orders or customers.

> **Note:**
>
> *ALLOW authority to Release Held Orders (ERHO) is required to advance to the **Manage Held Orders** page.

When you advance to the **Manage Held Orders** page by clicking in the bar chart for a hold reason, the held orders displayed on the page are filtered by the selected hold reason. It may take a few seconds for the filter to be applied.

The **Held Order Summary** page remains open when you advance to the **Manage Held Orders** page.

Table View Options

Filter displayed hold reasons: Optionally, enter one or more search terms and press **Enter** to filter the displayed hold reasons in the table to those with descriptions or hold reason codes that contain or match your entry:

- The filter is not case-sensitive.
- You can also enter an additional string of characters in the **Filter** field and press **Enter** to restrict the displayed records to those that contain all entered search criteria.
- You can remove any search criteria by clicking the X to the right of the search term. The page updates the filtered results immediately.

Sorting: You can click on a column heading to sort the displayed hold reasons in ascending or descending order based on the selected column.

Advance to the Manage Held Orders page: Click the hold reason description to advance to the *Manage Held Orders* page, where you can review more information on orders assigned that hold reason, further filter the displayed orders, generate the Held Orders report, or advance to pages where you can work with the orders or customers.

> **Note:**
>
> *ALLOW authority to Release Held Orders (ERHO) is required to advance to the **Manage Held Orders** page.

When you advance to the **Manage Held Orders** page by clicking in the bar chart for a hold reason, the held orders displayed on the page are filtered by the selected hold reason. It may take a few seconds for the filter to be applied.

The **Held Order Summary** page remains open when you advance to the **Manage Held Orders** page.

Fields on Held Order Summary

Purpose: The fields below are on the **Held Order Summary** page.

- *Fields in Graph View*
- *Fields in Table View*

For more information: For more information on Held Order Summary, see:

- *Held Order Summary* for an overview of the **Held Order Summary** page.
- *Held Order Summary Options* for step-by-step instructions on the actions you can perform on the **Held Order Summary** page.

Fields in Graph View

About the Y (Vertical) Axis

The Y axis displays two scales to illustrate the total number and open merchandise value of held orders:

- **Orders:** Illustrates the scale of number of orders by hold reason.
- *Order Value in Currency* (for example, USD): Illustrates the total value of the orders by hold reason, using the *Local Currency Code (A55)*.

The two scales are proportional to the largest number of orders or value displayed. For example:

- If the hold reason with the largest number of orders includes 83 orders, the **Orders** scale goes from 0 to 100 by tens.
- If the hold reason with the highest merchandise value has a total value of 14,000, the **Order Value in Currency** scale goes from 0 to 15K by three thousands.

Hold Reasons Displayed in Graph View

For each hold reason:

- The hold reasons are listed in alphabetical order based on the *Hold Reason* descriptions, and the descriptions are displayed vertically if there is not enough space to display them horizontally; in this case, the descriptions may be truncated.
- **Bar indicating total number of orders:** The height of the bar displayed for the hold reason is proportional based on the number of orders currently held for that reason.
- **Line indicating the total current merchandise value of held orders with the hold reason:** The height of the line displayed for the hold reason is proportional based on the merchandise value of the orders held with that reason.

Hold reasons not displayed: The following types of hold reasons are not displayed:

- Ship-to hold reasons, such as ship-to fraud. These orders are included under the ship-to only hold reason.
- Pay type holds applied by the system, including the waiting credit-card authorization hold (CW hold).

Position your cursor over the bar for the hold reason to display:

- The *Hold Reason* description.
- The total open merchandise balance for orders that are assigned that hold reason. Includes all ship-tos on all orders assigned the hold reason.
- The total number of orders assigned that hold reason. Orders with multiple ship-tos increase the total by 1, not by the number of ship-tos. User-assigned holds, identified by

(User Hold), are listed separately from system-assigned hold if the hold has been applied both by the system and by a user.

If multiple hold reasons applied to an order: An order can have multiple hold reasons applied, and in this case it is included in the total order count and merchandise value for each hold reason. For example, an order is on a time hold, and a user hold has also been applied. The order is included in the totals for both hold reasons.

Fields in Table View

The page displays up to 10 hold reasons at a time in table view. The hold reasons are listed in alphabetical order based on the *Hold Reason* description:

- **Hold Description** (*Hold Reason* description:). The hold reason code is displayed if there is no description.

  User holds: User-assigned holds are indicated by (User Hold) following the description. If the same hold reason has been assigned by the system and also as a user hold, it is listed twice: once with just the hold description, and once with the description indicated by (User Hold).

  Hold reasons not displayed: The following types of hold reasons are not displayed:

  – Ship-to hold reasons, such as ship-to fraud. These orders are included under the ship-to only hold reason.

  – Pay type holds applied by the system, including the waiting credit-card authorization hold (CW hold).

- **Hold Reason** (*Hold Reason* code).
- **Orders:** The total number of orders assigned that hold reason. User-assigned holds, identified by (User Hold), are listed separately from system-assigned holds with the same hold reason code. Orders with multiple ship-tos increase the total by 1, not by the number of ship-tos.

  If multiple hold reasons applied to an order: An order can have multiple hold reasons applied, and in this case it is included in the total order count and merchandise value for each hold reason. For example, an order is on time hold, and a user hold has also been applied. The order is included in the totals for both hold reasons.

- **Value:** The total open merchandise balance for orders that are assigned that hold reason. Includes merchandise for all ship-tos on all orders assigned the hold reason.

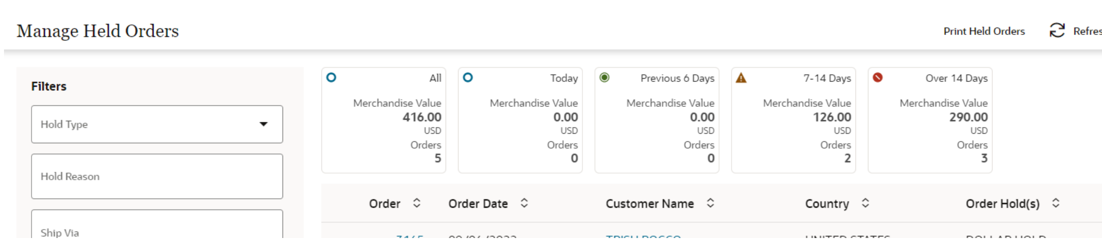
11 Manage Held Orders

Overview: Use the **Manage Held Orders** page to review held orders, including total open merchandise values and counts broken out by time period. You can also use this page to generate the Held Order by Reason Code report, or advance to the *Customer Order List* or *Order Summary* page.

How to display: Select **Manage Held Orders** from a menu, or click on the bar chart for a hold reason at the *Held Order Summary* page and select **View Holds**.

When you advance to the **Manage Held Orders** page from the *Held Order Summary* page, the held orders displayed on the page are filtered by the selected hold reason. It may take a few seconds for the filter to be applied.

> **Note:**
>
> All orders that are assigned the hold reason are displayed at the **Manage Held Orders** page, regardless of whether the hold was assigned by the system, or as a user hold.



Required authority: To advance to this page, you need full **ALLOW** (not **DISPLAY**) authority to the ERHO menu option. See **Setting Up Menu Options (WOPT)** in the Classic View online help for background.

For more information:

- *Manage Held Orders Options* for step-by-step instructions on the actions you can perform on the **Manage Held Orders** page.
- *Fields on Manage Held Orders* for a description of the fields on the **Manage Held Orders** page.

Manage Held Orders Options

Purpose: You can perform the following actions on the **Manage Held Orders** page.

- *Filter the Displayed Held Orders*
- *Advance to the Order Summary Page for a Displayed Order*
- *Advance to the Order List Page for a Displayed Customer*

- *Print the Held Order by Reason Code Report*
- *Refresh the Displayed Information*

For more information:

- *Manage Held Orders* for an overview of the **Manage Held Orders** page.
- *Fields on Manage Held Orders* for a description of the fields on the **Manage Held Orders** page.

Filter the Displayed Held Orders

Apply one or more of the *Filters* and click **Filter** to update the *Held Order List* and the *Held Order Summary Total Tiles*. If you apply multiple filters, only orders that match all filters are displayed; however, filtering on order number or customer number overrides other filters. See the list of *Filters* for more information.

Optionally, click **Reset** to clear the currently entered filters. You can then click **Filter** to display all held orders.

Advance to the Order Summary Page for a Displayed Order

Click the *Order Number* displayed in the *Held Order List* to advance to the *Order Summary* page.

Advance to the Order List Page for a Displayed Customer

Click the *Customer Name* displayed in the *Held Order List* to advance to the *Customer Order List* page.

Print the Held Order by Reason Code Report

Click **Print Held Orders** in the upper right to open the **Create Held Orders Report** window.

Optionally, select any of the *Create Held Orders Report Window* fields before clicking OK, or click **Cancel** to cancel generation of the report.

Viewing the report: Use the **My Jobs** or **My Docs** options in Classic View to view the report. If you use **My Jobs**, the report is available under the HO_RPT job.

The report is available in both PDF and spreadsheet (xlsx) format.

See *Held Order by Reason Code Report Contents* for information on the contents of the report.

Refresh the Displayed Information

Click **Refresh** in the upper right to refresh the displayed information on the page, including the *Held Order Summary Total Tiles* and the *Held Order List*. The current filters apply to the refreshed results.

Fields on Manage Held Orders

Purpose: The fields displayed on the **Manage Held Orders** page are listed below, and include:

- *Filters*

- *Held Order Summary Total Tiles*
- *Held Order List*
- *Create Held Orders Report Window*
- *Held Order by Reason Code Report Contents*

For more information: For more information on Manage Held Orders, see:

- *Manage Held Orders* for an overview of the **Manage Held Orders** page.
- *Manage Held Orders Options* for step-by-step instructions on the actions you can perform on the **Manage Held Orders** page.

Filters

Hold Type: Filters the *Held Order List* to orders that have that hold type applied. Can select one type.

Hold Reason: Filters the *Held Order List* to orders that have the selected hold reason code(s) applied. Can select one or more, clicking **Filter** after selecting each hold reason, to select orders that have each selected hold reason applied. If necessary, click to the right of any hold reason that has already been selected to display the list of additional hold reasons.

> **Note:**
>
> Filtering is not supported for the Awaiting Credit Card Auth (CW) hold, and this hold reason is not displayed in the *Held Order List*. If the CW hold is the only hold reason assigned to the order, the order is not displayed.

Ship Via: Filters the *Held Order List* to orders that use the selected ship via(s), including any ship-tos for an order with multiple ship-tos. Can select one or more ship vias, clicking **Filter** after selecting each ship via. If necessary, click to the right of any ship via that has already been selected to display the list of additional ship vias.

Country: Filters the *Held Order List* to orders whose sold-to customers have addresses in the selected country(ies). Can select one or more countries, clicking **Filter** after selecting each country. If necessary, click to the right of any country that has already been selected to display the list of additional countries.

New Customers Only: Select to filter the *Held Order List* to orders whose sold-to customers were newly created for the held orders. The ship-to customer is not considered for filtering.

Date From: Filters the *Held Order List* to orders created on or after that date. Can select or enter a date that is not later than the **To date**.

Date To: Filters the *Held Order List* to orders created on or before that date. Can select or enter a date that is not earlier than the **From date**.

Order Number: Filters the *Held Order List* to the entered order. Can enter a single order. When you specify an order number, any additional filters are ignored.

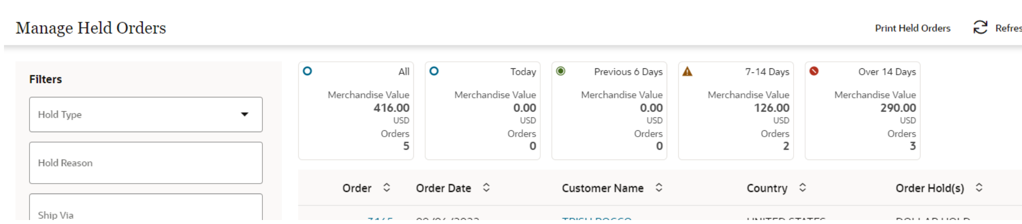
> **Note:**
>
> If you enter a 4-digit number in a date field, your entry is interpreted as the year, and the current day and month are filled in. For example, if you enter 2022 and the current date is April 1, the date is filled in as 4/1/2022, depending on the date format for your locale.

Customer Number: Filters the *Held Order List* to orders where the specified customer is the sold-to customer. Can enter a single customer number. When you specify a customer number, any additional filters besides order number are ignored; the results are filtered based on order number if you enter both a customer number and an order number.

Use one or more of the above filters and click **Apply Filters** to restrict the displayed orders, as well as the totals displayed in the summary tiles, to those matching your selections.

Held Order Summary Total Tiles

The tiles display the information below for the orders currently included in the *Held Order List*.



Period: Totals are displayed for the following periods:

- **All:** The total number of orders and merchandise value for all orders matching the filter criteria, regardless of date. Includes a hollow blue circle ( ) icon in the upper left.
- **Today:** The total number of orders and merchandise value for all orders matching the filter criteria that were initially created on the current date.
  - Does not include ship-tos or items added to existing orders that were created earlier than the current date.
  - Includes a hollow blue circle ( ) icon in the upper left.
  - The circle around the merchandise total for **Today**, if any, uses blue to indicate the percentage of the total open merchandise it represents for all orders matching the filter criteria; see the description of the **Merchandise Value**, below, for a discussion.
- **Previous 6 Days:** The total number of orders and merchandise value for all orders matching the filter criteria that were initially created on the previous 6 days.
  - Does not include ship-tos or items if they were added to existing orders on the current date.
  - Includes a green bullseye ( ) icon in the upper left.

- The circle around the merchandise total for **Previous 6 Days**, if any, uses green to indicate the percentage of the total open merchandise it represents for all orders matching the filter criteria; see the description of the **Merchandise Value**, below, for a discussion.

- **7-14 Days:** The total number of orders and merchandise value for all orders matching the filter criteria that were initially created from 7 to 14 days before the current date.
  - Does not include ship-tos or items added to existing orders on the current date or the last 6 days. I
  - Includes a orange triangle (⚠) icon in the upper left.
  - The circle around the merchandise total for **7-14 Days**, if any, uses orange to indicate the percentage of the total open merchandise it represents for all orders matching the filter criteria; see the description of the **Merchandise Value**, below, for a discussion.
- **Over 14 Days:** The total number of orders and merchandise value for all orders matching the filter criteria that were initially created more than 14 days before the current date.
  - Does not include ship-tos or items added to existing orders on the current date or during the last 14 days.
  - Includes a red circle (⊘) icon in the upper left
  - The circle around the merchandise total for **Over 14 Days**, if any, uses red to indicate the percentage of the total open merchandise it represents for all orders matching the filter criteria; see the description of the **Merchandise Value**, below, for a discussion.

Merchandise Value: The total current merchandise value for the held orders currently included in the *Held Order List* for the period.

About currency: If the *Multi Currency by Offer (E03)* system control value is selected, the merchandise balances are converted into the *Local Currency Code (A55)* by multiplying the order's total open merchandise balance by the conversion rate defined for the currency through Work with Currency (WCUR). For example, if the order currency is US dollars, the local currency is the Euro, and the current conversion rate is .9, then an order total of $100.00 is converted to a total of 90 Euros. Note that this is the conversion rate is recorded in the Order Header Extended table when the order was created.

Otherwise, if the *Multi Currency by Offer (E03)* system control value is not selected, the merchandise balances for the orders are not converted. In the above example, the order merchandise total of $100.00 is used to calculate the total open merchandise value, even if other orders included in the total used different currencies.

Note that the Held Order by Reason Code report lists amounts in the order currency, and is broken out by currency. See *Held Order by Reason Code Report Contents* for more information.

Updates to an existing order: When you change an existing order, such as adding any items or ship-tos, the merchandise value increases for the period that includes the original order date. For example, if you add an item to an order created yesterday, its merchandise total is included in the **Previous 6 Days** period.

Orders: The total number of held orders included in the *Held Order List* for the period. Orders with multiple ship-tos increase the count by just one.

Held Order List

Shows the held orders matching any currently-applied filters. Displayed in ascending order by date (newest to oldest) and then by order number (lowest to highest, if the order numbers were not assigned in chronological order).

Order (*Order Number*): Click the order number to open the *Order Summary* page for the order.

Order Date

*Customer Name***:** Just the customer's first and last names are displayed; but if there is no last name, the company name is displayed. Click the customer's name to open the *Customer Order List* for the customer.

New customer indicator: The word **NEW** indicates that no previous orders have shipped to the sold-to customer.

Country: Just the country description is displayed.

Order Hold(s) (*Hold Reason*): The description of each hold reason assigned to the order is displayed.

- If the hold is assigned to a specific ship-to on a multi-recipient order, the ship-to number is displayed in parentheses.
- If there is a pay type hold related to a specific credit card, such as a miscellaneous fraud match, the payment type description is displayed, and the last 4 positions of the credit card are displayed in parentheses.
- (User) appears to the right of the hold reason description for a user hold.
- A hold reason of `[object Object]` indicates that the system assigned a hold reason code that has not been configured in the **Work with Order Hold Reason Codes (WOHR)** menu option in Classic View. Use the Classic View menu option to review the order hold reason and create the hold reason code to resolve the issue.
- The Awaiting Credit Card Auth (CW) hold reason is not displayed.

Create Held Orders Report Window

Reason Code (*Hold Reason* code): Optionally, select the description of the hold reason, or leave this field blank to include held orders regardless of hold reason.

Pay Type (*Payment Method*): Optionally, select the description of the payment type used on the order, or leave this field blank to include held orders regardless of payment type.

*Ship Via Priority***:** Optionally, select the code identifying the priority assigned to the ship via on the order, where 1 is the lowest and 9 is the highest, or leave this field blank to include held orders regardless of ship via priority.

Held Order by Reason Code Report Contents

This report page breaks on currency code. Within currency code, the system sorts held orders in ascending order by ship via priority, user hold, pay type hold, SH hold, and order number sequence.

- **Selection Criteria:** The selection criteria you selected at the *Create Held Orders Report Window*, if any.
  - **Reason Code:** The reason code you selected. **ALL** displays if you did not select a reason code.
  - **Pay Type:** The pay type you selected. **ALL** displays if you did not select a pay type.

  - **Via Priority:** The ship via priority you selected. **ALL** displays if you did not select a ship via priority.
- **Currency:** The report is broken out by currency. Both the currency code and the description are listed.
- **For each hold reason code and ship via priority for the same currency:**
  - **Reason:** The system hold reason on the order. From **OHD OHR Sys hold reason** in the Order Header table. Blank for user hold reasons, which are grouped together and listed first, with the user hold reason code indicated in the left-most column for each order on user hold.

    > **Note:**
    >
    > The Awaiting Credit Card Auth (CW) hold reason is not included on the report.

  - **Ship Via Priority:** The ship via priority for the ship via on the Order Header. From **VIA Priority** in the Ship Via table.

    The following column headings apply to the data below the **Reason** and **Ship Via Priority**.
  - **User Hold:** The user hold, if any. From **OHD OHR Usr hold reason** in the Order Header table.
  - **Payment Type Hold:** The pay type hold, if any. From **OHR Hold Reason** in the Order Payment Method table.
  - **Ship To Hold:** The ship to hold, if any. From **OST OHR Hold Reason** in the Order Ship To table.
  - **Order Number:** The order number. From the **Order #** in the Order Header table.
  - **Payment Type Code:** The pay type code; **MLT** displays if more than one pay type was used on the order. From **PAY Pay type** in the Order Payment Method table.
  - **Ship Via Code:** The ship via code for the Order Ship To. From **Ship via** in the Order Ship To table.
  - **Customer Number:** The sold-to customer number. From *Customer #* in the Order Header table.
  - **Name:** The company name for the sold to customer. If a company name is not defined, this is the last name and first name of the sold-to customer. From **NAM Company name** in the Customer Sold To table or from **NAM Last Name** and **NAM First Name** in the Customer Sold To table.
  - **Telephone/Email:** The sold-to customer's day time phone number, followed by the first 29 positions of the sold to customer's primary email address. From **CS# Phone** in the Customer Sold To Phone # table and **CEM Email Address** in the Customer Sold To Email table.
  - **Order Total:** The total order value (not the current merchandise value). From **OST Add'l charges + OST Freight + OST Handling + OST Add'l freight + OST Tax + OST GST + OST PST + OST Merch** in the Order Ship To table. **Note:** This total displays in the order currency, regardless of the setting of the **Multi Currency by Offer (E03)** system control value.

  - **Order Date:** The date the order was placed. From the **OHD Order Date** in the Order Header table.
  - **Authorization Date:** The most recent date when the credit card on the order was authorized. From the **Auth Date** in the Authorization History table.
- **Total dollars on hold:** The total order value (not the current merchandise value) for the system hold reason, or for all orders on user holds with the same currency. From **OST Add’l charges + OST Freight + OST Handling + OST Add’l freight + OST Tax + OST GST + OST PST + OST Merch** in the Order Ship To table for all orders with the specified system hold reason.
- **Grand total [Currency code]:** The total order value for the currency code. From **OST Add’l charges + OST Freight + OST Handling + OST Add’l freight + OST Tax + OST GST + OST PST + OST Merch** in the Order Ship To table for all orders on the report that use the same currency.

12 Order Entry

About streamlined order entry in Contact Center (CCOE): This topic describes the streamlined process you can use to create a new order in Contact Center, including:

- Selecting an existing customer for the order, or creating a new customer.
- Entering or verifying customer information.
- Adding items to the order.
- Entering or verifying the shipping address, the ship via, and other information related to shipping the order.
- Reviewing and confirming the information for the order.
- Entering the payment information.
- Submitting the order.

Status of order entry steps: As you advance through the steps to entering an order, the status of each step is indicated at the top of the page. For example, in the image below, the statuses are indicated as follows:

- **Green check:** The **Customer Search**, **Customer Information**, and **Items** steps have all been completed successfully.

  Note: This status might also indicate that you have used the **Previous** button from that step to return to a prior step, even if you have not completed the next step. For example, if you clicked **Previous** at the **Review** step because there was an error at the **Shipping** step, the **Review** step would be indicated with the green check.
- **Red X:** There is an error related to the **Shipping** step.
- **Black:** The **Review** step is the current step.
- **Very light gray:** The **Payments** step has not yet been started.

How to display: Select Order Entry from a menu, or select **+ Create Order** from the *Customer Order List* page.

Order Entry available? Streamlined order entry is available in Contact Center only if:

- **Required authority:** You must have ALLOW authority to Contact Center Order Entry (CCOE), Order Entry (OEOM), and Order Inquiry/Maintenance (OIOM).
- **Required system control values:** The following system control values must be set as follows.
  – *Current Offer (A33)* must be specified.
  – *Default Order Type (B28)* must be specified.

- *Default Delivery Code for New Order Entry Customers (D13)* must be specified. In MV Address Book, if this value is blank, then the default for Delivery is No Distinction.
- *Default Source Code in Contact Center Order Entry (M55)* must be specified, and the specified source code must not be flagged as restricted.
- If *Require Salesrep # in Order Entry/Order Maintenance (E87)* is selected, the *Default Salesrep # (E86)* must specify a valid sales rep, flagged as **Active**, set up through Work with Salesreps (WSLS). otherwise you cannot access Modern View Order Entry.
- Even if the *Require Salesrep # in Order Entry/Order Maintenance (E87)* system control value is not selected, if a *Default Salesrep # (E86)* is specified, it must be a valid sales rep that is flagged as Active.
- The *Maximum Order Quantity (C60)* system control value must be specified, or you will not be able to add any items to the order. You can set this value to a high number to avoid any errors related to order quantity.
- The *Price Codes (D93)* system control value must be unselected if you are using the loyalty and awards integration with Customer Engagement. See *Customer Engagement Loyalty Integration* for an overview.

- **Additional required settings:**
  - A current accounting period, set up through Work with Accounting Periods (WACP), is required.
  - If the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is selected and *Default Customer Class in Order Entry (D63)* is blank, then you must have ALLOW authority to the *Maintenance of Customer Class* Field secured feature to perform order entry.
  - If the *Require Phone Number in OE/OM (H01)* system control value is selected, the **Phone** field should be selected for display in Work with Contact Center (WWCC).
  - If the ORCE Customer Integration is enabled, based on the *ORCE Customer Integration (L37)* system control value being set to INTERACT, and the *Use ORCE Registries (M26)* system control value is selected, then the *Default Location for ORCE Integration (K69)* system control value must specify a valid location in Customer Engagement.
  - If the Oracle Retail Promotion Engine (ORPE) Integration is enabled, based on the *Use ORPE Promotion Engine (M77)* system control value, order entry has been changed to support the deal types and promotions. See Oracle Retail Promotion Engine Integration in the Integration and Import/Export Guide for details on ORPE integration.
  - Use *Price Override Reason for ORPE Discounts (M78):* system control value to set the price override reason code to apply to order lines that are discounted through use of the ORPE.
  - Select *Use ORCE Serialized Coupons (M79)* system control value to use Serialized Coupons with ORPE.
  - Set *ORCE Serialized Coupon Prefix Length (M80)* system control value to store the Serialized coupon codes prefix length value. It must match the value defined in Property Configuration Promotion Coupon Length within ORCE.

Not included in streamlined order entry: Not all features that are available in Classic View order entry are also available in streamlined order entry in Contact

Center. For example, the following features are not available in streamlined order entry:

- Assigning a bill-to or permanent ship-to customer to the order.
- Creating multiple ship-to addresses.
- Entering customer demographic information.
- Entering the expanded customer address.
- Selecting a different order type.
- The Experian Data Quality integration.

About registry orders: See *Review Registries or Create a Registry Order*, as well as the *Customer Engagement Customer Gift Registry and Wish List Integration* topic in the Classic View online help, for background on registry order.

In this topic:

- *Customer Search (Order Entry Step 1)*
- *Customer Information (Order Entry Step 2)*
- *Items (Order Entry Step 3)*
- *Shipping (Order Entry Step 4)*
- *Review (Order Entry Step 5)*
- *Payment (Order Entry Step 6)*
- *Submit Order (Final Step)*

For more information:

- *Order Entry Options* for information on the steps required to enter an order.
- *Fields in Order Entry* for information on the fields available at each step in entering an order.

Customer Search (Order Entry Step 1)

Purpose: Use the **Find and Select a Customer** step to:

- Search for an existing customer for the order based on any of the search fields, and:
  - Select a customer from the search results, or
  - Create a new customer for the order.

For more information: See *Find and Select Customer* and *Find and Select a Customer Fields*.

Customer Information (Order Entry Step 2)

Purpose: Use the **Enter or Verify Customer Information** step to:

- Confirm that the current information for an existing, selected customer is correct, or
- Create a new customer record for the order.
- Optionally, specify a different source code for the order.

Searching for customers through integration with Customer Engagement is not supported.

For more information: See *Enter or Verify Customer Information* and *Enter or Verify Customer Information Fields*.

Items (Order Entry Step 3)

Purpose: Use the **Add Items to Order** step to:

- Search for each item to add to the order based on item ID, description, or keyword, and
- Specify the quantity for each item, and
- Add the item to the order.

An order summary panel displays to the right, indicating the customer, current merchandise total, and the items and quantities on the order. Optionally, you can update the order line quantity or delete an order line.

At this step, you can also select a loyalty card that the customer can use to apply an award to the order if the customer has more than one loyalty card.

For more information: See *Add Items to the Order* and *Add Items to Order Fields*.

Shipping (Order Entry Step 4)

Purpose: Use the **Select Shipping Option and Enter Other Details** step to:

- Specify whether to:
  - Ship the order to the sold-to customer's address, or
  - Enter another shipping address, or
  - Generate multiple ship-to addresses, or
  - Select a store location where the customer can pick up the order, either as a store pickup or a ship-for-pickup order.
- Review and optionally update shipping details and additional order details.
- When integrated to Oracle Retail Promotion Engine (ORPE), ORCE can be configured to include shipping awards to optionally apply an Override Shipping Method (Ship Via) and/or the ability to define a discount from the following options:
  - an Override Price (flat shipping fee),
  - an Amount Off (Order Administration deducts the value from the shipping calculation) or
  - a Percent Off (Order Administration calculates the discount percentage amount then deducts the value from the shipping calculation)

  All shipping award discount options are applied as a shipping override.

For more information: See *Select Shipping Option and Enter Other Order Information*.

Review (Order Entry Step 5)

Purpose: Use the **Verify Order Information** step to:

- Review the information on the order.
- Correct any order information that causes an error.
- Apply any updates to the order.
- Apply additional charges to the order.

- When integrated to Oracle Retail Promotion Engine (ORPE), apply product and coupon promotions.

You need to select **Refresh Order** at this step to apply any updates. If you make any changes on at this step or any previous step, the **Refresh Order** button is enabled and required. You must select **Refresh Order** for your updates to be saved prior to entering payment information.

For more information: See *Review Order and Verify Order Information*.

Payment (Order Entry Step 6)

Purpose: Use the **Add Payment to the Order** step to:

- Add at least one payment method to the order. *EFTConnect* is leveraged for communication between Order Administration and Payment Service Providers (PSP) for card-based payment processing. You can add multiple payment methods to the order if the *Allow Multi Pay Types (A74)* system control value is selected. If the payment methods include one or more credit card pay types, at least one of them must be the *Catch-All*.
- Optionally, edit payment methods on the order.
- Optionally, apply a manual authorization for the payment method.
- Optionally, review or delete payment methods.
- Check gift card balance.

For more information: See *Add Payment*.

Submit Order (Final Step)

After completing entry of one or more payment methods, use the **Submit Order** option to submit the order for creation. For payments configured through *EFTConnect*, an authorization request is submitted automatically. If successful, the card token is returned.

When integrated with Oracle Retail Promotion Engine (ORPE), a System Update entry is written in the Order Activity tab when:

- a coupon code is entered but not successfully applied by ORPE.
- a serialized coupon is successfully applied by ORPE and it is successfully redeemed or not.

The system performs some final error-checking at this step. If you confirm order submission, the order is created.

See *Submit Order* for more information.

Order Entry Options

Purpose: This help topic describes the actions available at each stage of the order entry process.

In this topic:

- *Enter or Verify Customer Information*
  - *Add, Change, or Delete the Phone Number at the Enter or Verify Customer Step*
  - *Navigation Options at the Enter or Verify Customer Step*
- *Messages Window*
- *Add Items to the Order*
  - *Select Card Window*
  - *Searching for an Item*
  - *Check Inventory for an Item/SKU*
  - *Selecting an Order Quantity and Adding the Item to the Order*
  - *Returning or Exchanging an Item/SKU*
  - *Window Sequence*
  - *Messages Window (Items)*
  - *Selecting Items and Adding them to a Registry Order*
  - *Navigation Options at the Add Items to Order Step*
- *Order Summary Panel*
  - Customer (Open Customer Order List)
  - *Loyalty Member*
  - Registry Name
  - *Messages*
  - *Delete*
  - *Coordinates*
  - *Personalize*
  - *Edit*
  - *Hide or Show Order Summary*
- *Select Shipping Option and Enter Other Order Information*
  - *Select the Customer Sold-To Name and Address for Shipping*
  - *Enter a Different Shipping Address*
  - *Add a Another Ship-To Address*
  - Manage Multiple Ship-To Addresses
  - *Search for and Select a Pickup Location*
  - *Review and Change Additional Order Information*
  - *Navigation Options at the Select Shipping Option and Other Details Step*
- *Review Order and Verify Order Information*
  - *Use the Prompt to Join Loyalty*
  - *Apply Awards*
  - *Edit Customer Information*

  - *Work with Additional Charges for a Ship-To Order*
  - *Edit Ship To Information*
  - *Edit Pickup Information*
  - *Add Items*
  - *Check Inventory for an Item/SKU*
  - *Review or Edit Personalization for an Item*
  - *Add Personalization for an Item*
  - *Edit Additional Details*
  - *Apply Coupon Code*
  - *Refresh Order*
  - *Navigation Options at the Review Order and Verify Order Information Step*
- *Add Payment*
  - *Add a Cash/Check Payment*
  - *Add a Credit Card or Debit Card Payment*
  - *Add a Gift Card (Stored Value Card) Payment*
  - *Add a Manual Authorization*
  - *Check a Gift Card's Balance*
  - *View Payment Details*
  - *Edit Payment*
  - *Delete Payment*
  - *Deactivate Payment*
  - *Navigation Options at the Add Payment to Order Step*
- *Submit Order*
- *Cancel Entry of the Order*
  - *If the Session Ends During Order Entry*

For more information:

- *Order Entry* for an overview.
- *Fields in Order Entry* for information on the fields displayed in order entry.

Find and Select Customer

The **Customer Search (Find and select a customer)** step is the first step in the order entry process, and includes the following options:

Search for a Customer

Complete any of the *Search for Customer Fields* at this step and click **Search Customers** to search for an existing customer for the new order. The customers matching your search criteria, if any, are displayed to the right.

See *Search for Customer Fields* for more information.

> **Note:**
>
> - You need to search with at least one search criterion, even if you are going to create a new customer record, in order to display the **Create New Customer** option.
> - You can also advance to order entry by selecting **+ Create Order** from the *Customer Order List* page.

Select a Customer

After searching for a customer, click on the correct customer displayed in the search results to enable the **Next** button at the bottom right. Click the **Next** button to continue to the *Enter or Verify Customer Information* step to verify the customer's information before you create an order for the selected customer.

Create a New Customer

To create a new customer instead of selecting an existing customer, select **Create New Customer** in the upper right. You advance to the *Enter or Verify Customer Information* step to enter the information for the new customer.

> **Note:**
>
> You need to first search for customers before the **Create New Customer** option is available.

Enter or Verify Customer Information

You advance to this step from the *Find and Select Customer* step after:

- Clicking **Next** after selecting an existing customer, or
- Clicking **Create New Customer**, or
- Selecting **Create Registry Order** at the Registries panel. In this case, the items on the registry are displayed at the next step, and the options available are somewhat different. See *Selecting Items and Adding them to a Registry Order*.

You can also advance to this step by selecting **Create Order** at the *Customer Order List* or *Customer Items List* page.

The Enter or Verify Customer Information window also opens if you select the **Edit** option for the Primary Address in the *Edit Ship-To* drawer on the *Order Entry Shipping* page.
When you are verifying the information for the selected customer: The *Enter or Verify Customer Information Fields* display the current information for the selected customer. Confirm the displayed information, updating as necessary.

When you are creating a new customer: The *Enter or Verify Customer Information Fields* are blank except for the search criteria you entered in the previous step, as well as certain fields that are populated by default by system control values.

Pickup or Ship-for-Pickup order: The customer's email address is required to create a *Store Pickup Order* or *Ship-for-Pickup Order*. Also, the customer's Email Opt-In setting must support email notifications. See the *Enter or Verify Customer Information Fields* for more information.

Customer Engagement integration: If the *ORCE Customer Integration (L37)* system control value is set to INTERACT, when you enter or verify customer information:

- If you enter the name and address for a new customer, or update the information for an existing customer, the customer information is created or updated in Customer Engagement after you complete this step and advance to the Items step.
- If the information you enter to create a new customer matches an existing customer in Customer Engagement, the customer record in Customer Engagement is updated.
- If the information you enter to create a new customer matches an existing customer in Order Administration, but the customer is not already assigned a Customer Engagement ID, the customer record in Customer Engagement is created, and the new Customer Engagement ID is assigned to the customer in Order Administration.
- If communication fails between Order Administration and Customer Engagement, the customer information is synchronized the next time you run the SYNCRDB periodic function in Classic View.

Add, Change, or Delete the Phone Number at the Enter or Verify Customer Step

Multiple *Phone Numbers* such as home, business and mobile (or fax) for the customer sold-to, can be added, edited, deleted and displayed within the *Enter or Verify Customer Information* step. The *Home Phone Number* field is always displayed, even when not populated.

Add a Phone Number: Click **+ Add Phone**. The **+ Add Phone** hyperlink displays only if less than three phone numbers are displayed.

- If there are no assigned phone numbers, select a phone number type, Business (supports an extension), or Mobile (or Fax number dependent on *Third Phone Number Type (L53)* system control value) and select OK. Enter the phone number in the phone type field. Only one phone number can be added per phone number type.
- If there is only a single phone type not yet assigned, the remaining phone type field is added when **+ Add Phone** is selected. Enter the phone number.

Edit a Phone Number: Change the phone number directly in the phone number field.

Delete a Phone Number: Select the delete icon next to the assigned phone number to *remove* the value in the phone number field. When *Require Phone Number in OE/OM (H01)* system control value is selected, at least one phone number is required. When *Require Phone Number in OE/OM (H01)* system control value is not selected, the phone number is not required and all assigned phone numbers can be deleted.

All phone number changes, additions, edits, or deletions, are saved when selecting **Next**. At the Shipping and Review steps, the phone numbers are formatted.

See the *Enter or Verify Customer Information Fields* for more information.

Navigation Options at the Enter or Verify Customer Step

After verifying the customer information or creating the new customer, click:

- **Next** to advance to the *Add Items to the Order* step. If any of the customer information is incorrect, it is highlighted, and you will need to correct it. See the *Enter or Verify Customer Information Fields* for more information.

- **Previous** to return to the *Find and Select Customer* step to select a different customer for the order. This option is not available if there are any items on the order.
- **Cancel** to *Cancel Entry of the Order*.

See *Customer Results Fields* for more information.

Duplicate customers found? When you enter the name and address for a new customer and click **Next**, if there are any existing customers whose match codes are the same as the new customer, the **Duplicate Customers Found** window opens. At this window:

- Select **New Customer Record** to create a new customer for the order, using the information entered at the *Enter or Verify Customer Information* step, or
- Highlight one of the customer records displayed under **Existing Customer Record**, and select this option to use the selected customer record when creating the order, then
- Select **Use Selected Customer** to confirm your selection, or select **Cancel** to remain at the **Enter or Verify Information** step.

If you select an existing customer record from the **Duplicate Customers Found** window, the customer record is updated with any changes entered at the **Enter or Verify Information** step.

> **Note:**
>
> - If you cancel after entering the new customer information but before advancing to the review step, the customer record is not created.
> - If you cancel after changing an existing customer's information and advancing to the Add Items step, the changes are retained.

Messages Window

At the *Enter or Verify Customer Information*, *Add Items to the Order*,*Select Shipping Option and Enter Other Order Information*, and*Review Order and Verify Order Information* steps, you can select the messages icon ( ) to open the **Messages** window. Within the Messages window, Order Notes apply to the entire order and show regardless of which ship-to you are on when opening the window and Messages apply to the specific Ship-To currently selected. All order notes stay with the order and are not removed when a ship-to is deleted. Your options here include:

- Adding or working with Order Notes:
  - **Add:** Select **+** below Order Notes to open the *Order Notes* window.
    - Optionally, select a **Message Template**. Only templates defined in Work with Default Messages (WMSG) in Classic View with a **Message Type** of **Order Message** and a **Print Code** of **Nowhere** are available for selection as message templates.
    - Enter a note **New Message** field, or modify the default note from the **Message Template**. Note that the **New Message** defaults to the same text as the **Message Template**, if selected, but you can override it. Your

entry cannot exceed 100 positions total. If your entry exceeds 60 positions, the system splits it into two separate order notes.

- **Edit:** Select the options icon (⋮) next to an existing order note and select **Edit** to open the **Order Notes** window, where you can edit the existing order note, and click **OK** to save your changes.
- **Delete:** Select the options icon (⋮) next to an existing order note and select **Delete** to delete the note.

See the *Order Notes* window for background.

> **Note:**
>
> When you click **OK** or **Cancel** at the **Order Note** window after editing the note, the **Messages** window also closes and you return to the previous page in order entry.

- Adding or working with Customer Messages (Gift Messages or Pick Slip Messages).
  - **Add:** Select **+** below Messages to open the *Messages Window*:
    - Select a **Message Type** of Gift or Pick Slip.
    - Optionally, select a **Message Template**. Default message templates are defined in Classic View (WMSG). Only message templates flagged to print on pick slips are available for selection when the Message Type is Pick Slip, and only message templates flagged to print for gifts are available for selection when the Message Type is Gift.
    - Enter a new message, or optionally modify the message defaulted from the template. Note that the selected Message Template and the default New Message are the same. Your entry cannot exceed 100 positions total. If your entry exceeds 60 positions, the system splits it into two separate order notes.
    - Click **OK** to save the message.
  - **Edit:** Select the options icon (⋮) next to an existing pick slip or gift message and select **Edit** to open the **Messages** window, where you can optionally modify the template or new message, and click **OK** to save your changes.
  - **Delete:** Select the options icon (⋮) next to an existing pick slip or gift message and select **Delete** to delete the message.

  See the *Messages Window* for background.

  > **Note:**
  >
  > When you click **OK** or **Cancel** at the **Messages** window after editing the message, the **Messages** window also closes and you return to the previous page in order entry.

- Adding or removing an Order *User Hold Reason*. See *Order Holds* for more information.

Gift order? This window also opens when you select the *Gift* Order flag at the *Select Shipping Option and Enter Other Order Information* step.

See *Messages Window Fields (Order-Level or Item-Level)* for more information.

Add Items to the Order

You advance to this step after clicking **Next** at the *Enter or Verify Customer Information* step. Note that the options are different when you are creating a registry order; see Selecting Items and Adding them to a Registry Order for more information.

If there is more than one ship-to on the order, the current ship-to selected, such as Ship-To 2 (ship-to name) is shown at the top to identify it. As items are added to the cart, they are immediately assigned to this ship-to. For a single ship-to address, no message is displayed. See *Multiple Ship-To Address Options* for more information on moving, copying and adding items to multiple shipping addresses.

Select Card Window

This window opens when you advance to the Items step only if the loyalty integration with Customer Engagement is enabled and the customer is enrolled in more than one card program.

This window displays information about each card program for the customer, including the award balance available for each. For each card displayed, if there are any entitlement coupons associated with the card, a message indicates the count available such as 5 entitlement coupons available. Highlight a card and select OK to assign that card to the order.

After you select a card, the available award balance for the card is displayed under the customer name at the Order Summary Panel Fields.

> **Note:**
>
> This window opens regardless of whether you are entering a registry order. See Selecting Items and Adding them to a Registry Order for more information.

Change or add loyalty card: After selecting a card, you can select the edit icon (✎) from the Order Summary fields before you submit the order to open the Select Card Window and select a different card. You also can use this option if you did not select a card when the Select Card window first opened.

Edit icon available when? The edit icon is available in the Order Summary fields at the Items, Shipping, or Review step; however, the edit icon is not available at the Payment step.

After selecting a card, at the *Review Order and Verify Order Information* step, you can select an award and amount for the card to apply to the order. See *Apply Awards* for more information.

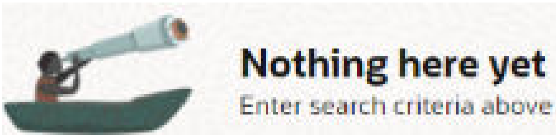
If the customer is enrolled in just one card program, this window is not available. You can use the *Apply Awards* window to apply an award amount to the order.

If the customer is not enrolled in a card program but loyalty is enabled, the options described under *Use the Prompt to Join Loyalty* may be available.

This window is available only if the *ORCE Customer Integration (L37)* system control value is set to INTERACT, and the *Use ORCE Loyalty (M06)* system control value is selected. See *Customer Loyalty List* for more information.

Searching for an Item

When you first advance to this step, no items are displayed, and an illustration indicates that there are not yet any items on the order, and to use the search option to select an item.



Enter one or more search terms to display items that fully or partially match your entry based on item code, description, or keyword; however, if your entry is an exact match to a specific item code:

- Partial matches are not displayed. For example, if you search on PEN and items include both PEN and PENCIL, only the PEN is displayed; but if you search on PEN and items include both PEN23 and PEN34, both items are displayed.
- Items that include your entry as part of their descriptions are not displayed. For example, if you search for SPICE and items include SPICE and an item with "spice" as part of the description, only the SPICE is displayed.

Searching is not case-sensitive; entering `item1` will find `ITEM1` as a match.

See Add Items Search Field in *Fields in Order Entry* for more information.

The items that match your search entry are displayed below, and the total number of matching items found is displayed above the list of matching items.

You cannot add an item to the order if:

- It is flagged as **Restricted**.
- It is assigned an item status that matches the Item *Status for Suppressing Item During Item Selection (L21)* system control value.
- It is a variable set.
- It has SKU's; instead, you need to select one or more specific SKU's, as described below.

If the Item has SKU's

Searching as described above finds the base item for a SKU'd item. Note that searching based on item or item description does not include results in the SKU'd items SKU's or SKU descriptions. For example, if the SKU'd item PEN has a SKU of BLUE with a description of BLUE INK, the PEN item is not retrieved when you search based on `blue` or `ink`.

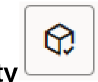
When a SKU'd item is in the search results, click **Select SKU's** to display all SKU's for the item. Optionally, you can then search based on the SKU description or code (variation). For example, enter `small` to list SKU's that include the word SMALL as a SKU element or part of its SKU description. The total number of displayed SKU variations is indicated.

Searching within the list of SKU's: Enter each search criterion separately and press **Enter** after each to find SKU's that include both of your search criteria, but not necessarily together. For example, to find a SKU that includes the description "blue stretch" enter `blue stretch`. However, this search does not retrieve a SKU with the description `blue cotton stretch`.

To retrieve this SKU, you would need to first enter one term, such as `blue`, and press **Enter**, and then add the second term, such as `stretch`, pressing **Enter** again. The total number of matching SKU's is displayed below the search entry box, for example: 3 of 10 Results.

Select **Back to Item Search** after reviewing the SKU's for an item, or selecting one or more SKU's.

Check Inventory for an Item/SKU

Once the items that match your search entry are displayed, item availability can be checked for that order line. Select the **Check Item Availability**  icon in the *Add Items to Order Fields* .

- If the *Use Merchandise Locator (I38)* system control value is unselected or if the *Use Merchandise Locator (I38)* system control value is selected but the item is not eligible for the merchandise locator, you advance to the *Inventory Information* window.
- If the *Use Merchandise Locator (I38)* system control value is selected and the item is eligible for the merchandise locator, you advance to the *Inventory Information (Merchandise Locator)* window.

> **Note:**
>
> - For set items, the **Check Item Availability** option is available for the set component item and not the main set item.

Selecting an Order Quantity and Adding the Item to the Order

When the **Add items to order** step displays the item or SKU that you wish to add to the order:

- Optionally, change the quantity, which defaults from the *Default Order Quantity (B30)* system control value. Your entry cannot exceed the *Maximum Order Quantity (C60)* system control value. You can add a negative quantity to return or exchange an item. See*Returning or Exchanging an Item/SKU* for more information.
- Click **Add to Order**.
  - The item is added to the **Order Summary** panel to the right. Items are displayed in reverse chronological order (newest at the top).
  - The **Order Total** fields in the **Order Summary** panel is updated with the extended price of the order line (quantity * price from the default *Current Offer (A33)* system control value) added to the **Merchandise** total.
    - The order totals, including tax, shipping, handling, and other charges, will be displayed at the *Review Order and Verify Order Information* step.
    - The item pricing may change at *Review Order and Verify Order Information* or after you add payment.

  * Components for a set item are displayed when you advance to the *Review Order and Verify Order Information* step.

  See *Special Types of Items* for more information on additional steps related to adding different types of items to an order.

After adding a SKU to the order: Click **Back to Item Search** to return to the list of items that match your search criteria.

See *Item Search Results Fields* and *SKU Search Results Fields* for more information.

If the maximum order line quantity or value exceeded: No error message is displayed if an order line exceeds the *Maximum Order Line Value (E98)* system control value, however:

- If you attempt to enter a quantity that exceeds the *Maximum Order Quantity* and you do not have authority under the *Allow Maximum Order Quantity Override* secured feature, the quantity field is highlighted in red and your entry is prevented. For example, if the *Maximum Order Quantity* is 25 and you attempt to enter a quantity of 30, a message indicates that you should enter a quantity from 1 to 25.
- If you enter an order line whose merchandise total exceeds the *Maximum Order Line Value*, no error message is displayed at this step; however, if you do not have authority under the *Allow Maximum Order Line Value Override* secured feature, the error is flagged at the *Review Order and Verify Order Information* step, and you will not be able to submit the order without correcting.

Customer's Registries: Select this option to open the Registries panel, which displays all existing registries for the customer. See *Registries Panel Fields* for more information. You can select a registry from this panel in order to switch to Selecting Items and Adding them to a Registry Order.

Special Types of Items

If the item requires personalization: The *Add Personalization* window opens automatically when you add an item to the order if a **S/H Code** is defined for Item Offer or SKU Offer, provided the **S/H Code** does not have the **Bypass S/H** flag set to **Bypass** and the **Suppress S/H Window** flag is not set to **Suppress.**

If the item has coordinates: The *Select Coordinate Items* window opens automatically when you add an item to the order if it is associated with one or more coordinates, provided the *Automatically Display Coordinate Items in Order Entry (I53)* system control value is selected and the **Promo** flag for the order type defined in the *Default Order Type (B28)* system control value is set to **Promo Price**; otherwise, if the item has coordinates, use the *Coordinates* option in the Order Summary panel to add a coordinate. See *Select Coordinate Items* for more information.

If the item is a set: The set components are not displayed in the **Order Summary** area at this step. They are displayed when you advance to the *Review Order and Verify Order Information* step.

If the item is sold out: The item is still added to the order, and the **Merchandise** total is still increased; however, the price of the soldout item is removed before you accept the order. While you are entering the order, the soldout line is displayed with the regular offer price.

If the item is a membership item. In order to create the customer membership program, the item code on the order needs to be identical to an active membership program. For example, to create a customer membership for membership program MEMB01, the item on the order needs to be MEMB01, where MEMB01 is a valid item code flagged as a membership item.

> **Note:**
>
> - You cannot include a membership item in a store pickup order.
> - If you create a membership through Modern View order entry and specify a ship-to address, the customer membership program that is created does not retain that ship-to address for generated membership orders. You can use Work with Customer Memberships (WWCM) in Classic View to assign the ship-to address for the membership program.

If the item has a ship via override: If the ship via on the order header is not valid for the item, the item will cause an error at the *Review Order and Verify Order Information* step. You need to know the valid ship via(s) for the item, as this information is not indicated at the *Edit Item Window*.

If the item has accompanying items: The accompanying items are added to the order and displayed at the *Review Order and Verify Order Information* step.

If the item has a quantity price break or other repricing applies: The updated price is displayed at the *Review Order and Verify Order Information* step.

If the item is a virtual stored value card: You cannot complete entry of the order if it includes a virtual stored value card and there is not an email address specified for the customer, or the customer's *Opt-In Status* setting indicates not to send email.

If the item is a warranty item: A warranty item is added to the order at no charge and a price override reason defaults. You cannot override the price for a warranty item.

If the order does not contain any items besides one or more soldout items, the order is created in Closed status.

Returning or Exchanging an Item/SKU

You can use *Items (Order Entry Step 3)* to perform an unverified return or exchange of a full or partial quantity of an order line.

When the *Add Items to the Order* step displays the item or SKU that you wish to return or exchange:

- Change the quantity to a negative number, which defaults from the *Default Order Quantity (B30)* system control value. Your entry cannot exceed the *Maximum Order Quantity (C60)* system control value.
- Click **Add to Order**. The **Add Unverified Return Item** page is displayed to enter the details of the return or exchange. See *Add Unverified Return Item Fields* for a description of the fields.
- On the **Add Unverified Return Item** page, optionally, change the number of items to refund. The quantity is defaulted to the **Quantity** entered on the Item/SKU page when **Add to Order** was selected.
- Enter a **Price Override** amount or select the **No Charge** option.
- Select a **Price Override Reason**.
- The next step depends on if the item is to be returned or exchanged.
  - **For an unverified return item:**

Select a *Return Reason* from the drop-down list.

  – **For an exchange item:**

    Select the **Return With Exchange** toggle switch and select an *Exchange Reason* from the drop-down list. Once the return has been successfully added to the order, you need to add the replacement item (exchange) through the *Add Items to the Order* step.

- Select whether returning this item affects inventory. If returning the item affects inventory, select a *Warehouse* and a *Warehouse Location* from the drop-down lists.
- Optionally, select **Refund Duty Charge** if duty should be refunded for the item.
- Click **Add to Order**. You are returned back to the*Add Items to the Order* step. The returned item line is added to the list of items on the order with a negative line quantity.
  – The returned item is added to the **Order Summary** panel to the right. Items are displayed in reverse chronological order (newest at the top). The quantity is shown as a negative number.
  – The **Order Total** fields in the **Order Summary** panel is updated with the extended price of the order line (quantity * price from the default *Current Offer (A33)* system control value) added to the **Merchandise** total. The **Merchandise** and **Total** will show a net total of all purchases and returns on the order. If the returns price is greater than the purchase price (if any), the values will be negative.
    * The order totals, including tax, shipping, handling, and other charges, will be displayed at the *Review Order and Verify Order Information* step.
    * The item pricing may change at *Review Order and Verify Order Information* or after you add payment.
    * Components for a set item are displayed when you advance to the*Review Order and Verify Order Information* step. For an unverified return or exchange and when the item is a Set, the system automatically adds all of it's components with negative quantities as well.
    * Upon*Submit Order*:
      * , if the entire order is an unverified return, it is immediately sent through billing. The item status is *Express Bill* during processing and the return has been processed without the need of generating a pick slip and bypasses the normal fulfilment process. Once the order is complete, the order is updated to Closed status.
      * if a regular item was entered; this item reserves and ships as usual.

Window Sequence

After you add an item, the following windows open if appropriate for the item:

- *Add Personalization* if the item requires personalization.
- *Messages Window (Items)* if there are any item/SKU status messages for the item, or any item/SKU comments associated with the item or SKU whose **Print Code** is set to **W Window**.
- *Select Coordinate Items* if there are any coordinate items associated with the item, provided the *Automatically Display Coordinate Items in Order Entry (I53)* system control value is selected.

Messages Window (Items)

This window opens if there is either an item/SKU status message defined for the selected item/SKU, or if there are any item/SKU comments defined for the item/SKU with a **Print Code** is set to **W Window**.

You can also open this window by clicking the messages icon ( ) to the right of an item at the *Review Order and Verify Order Information* step, or from the Order Summary panel.

Status Messages

Included only if an item/SKU status message is defined for the status code associated with the item or SKU.

- *Item/SKU Status Message*: Unlabeled field below the **Status Messages** title. Each status message is in a separate row. Status messages defined at the SKU level display; if there are no status messages defined at the SKU level, status messages defined at the item level display.

Comments

Included only if there are any item/SKU comments associated with the item or SKU whose **Print Code** is set to **W Window** and includes:

- *Item/SKU Comment*: Unlabeled field below the **Comments** title. Each comment is in a separate row. Comments defined at the SKU level display; if there are no comments defined at the SKU level, comments defined at the item level display.

Add an Order Line Message

The **Messages** window includes the **+** option to add an order line message, which opens a window where you can add messages for the item. See *Add an Order Line Message* for more information.

Edit an Order Line Message or Delete a Message

The **Messages** includes an actions menu ( ) for each existing order line message. Optionally, select **Edit** to edit an existing message, or select **Delete** to delete a message.

Selecting Items and Adding them to a Registry Order

The Add Items to Order step for a registry order, displayed after you select Create Registry for a customer at the *Registries Panel Fields* or select a registry through the Customer's Registries link in the upper right at the *Add Items to the Order* step, is similar to the Add Items to Order step for a regular order, except:

- Only items on the selected registry are listed; however, you can search for other items by selecting **Back to Item Search** on the upper left and add those items to the order.
- The **Customer's Registries** option on the upper right enables you to display all of the customer's registries. The **Customer's Registries** button will always show if the configuration is set, even if there is no data to display. If the customer has more than one registry, you can select this option to open the *Registries Panel Fields* and optionally select a different registry in order to display items from that registry and add them to the order.

This option is available only if *ORCE Customer Integration (L37)* is set to INTERACT, the *Use ORCE Registries (M26)* system control value is selected, and the customer sold to record has an ORCE Customer ID from the RELATE_ID field.

Filter displayed registry items: Optionally, enter a full or partial item description or code to restrict the displayed registry items to those matching your entry.

Other things to note about registry orders:

- When you add an item from a registry to the order, the registry associated with the item is indicated to the right in the Order Summary panel.
- You cannot select an item for a registry order if the item description is `Store only item`, which indicates that the item is not available through Order Administration.
- The Add Items to Order step does not prevent you from entering a quantity for an item on the registry that exceeds the *Quantity Desired* for the registry
- The address defined for the registry in Customer Engagement does not default as the shipping address to the order; the customer's regular address is used unless you override it.
- The *Quantity Purchased* for each item on a registry order increases after you submit the order. Also, an Order Transaction History record indicates that an item was purchased for a registry, for example: `Line 2 purchased from Sample Registry`.
- Restricted items on a registry cannot be added to an order.
- Variable set items on a registry cannot be added to an order for the registry.
- If an item on the registry is assigned the status defined in the *Item Status for Suppressing Item During Item Selection (L21)* system control value, the item is not displayed during registry order creation.
- If you change the order quantity for an item on a registry order after order creation, the update is not sent to Customer Engagement, and the Quantity Purchased is not updated.

For more information: See *Add Items to Order Fields for a Registry Order* for field details.

Select **Back to Item Search** to switch to the standard *Add Items to the Order* step.

> **Note:**
>
> Even if the items in the standard Add Items to the Order step are included in the registry, any items you add to the order here are not identified by the name of the registry in the *Order Summary Panel*, and do not update the Quantity Purchased when you accept the order.

Navigation Options at the Add Items to Order Step

Click **Previous** to return to the *Enter or Verify Customer Information* step. Note that you cannot return to the *Find and Select Customer* step after adding any items to the order.

Click **Next** to advance to the *Select Shipping Option and Enter Other Order Information* step.

Select **Cancel** to *Cancel Entry of the Order*.

- If you had selected an existing customer and applied any updates at the *Enter or Verify Customer Information* step, your changes are retained.
- If you had begun creation of a new customer, the customer record is not retained.

Order Summary Panel

The Order Summary panel includes the following options for each line on the order. See *Order Summary Panel Fields* for more information on displayed fields.

You can use these options at any point in the order entry process until you complete the order.

Displaying the Order Summary panel: Use the **Order Summary** icon () at the top right to open or close the **Order Summary** panel. You can open or close the **Order Summary** panel at any point while entering an order, but no information is displayed until you select or create a customer for the order.

Customer (Open Customer Order List)

Click the *Customer Summary Fields* (customer name and number) in the Order Summary panel to open the *Customer Order List* in a new tab.

This option is available at the *Add Items to the Order* step when you select an existing customer for the order; otherwise, when you create a new customer, the option is available at the *Review Order and Verify Order Information* step, although there will be no customer orders to review.

Loyalty Member

The Loyalty Member icon and label (Loyalty Member) indicates that the customer is currently enrolled in one or more loyalty programs. If the customer is enrolled in more than one loyalty program, you can click the edit icon () to open the *Select Card Window* .

Entitlement Coupons

The *Entitlement Coupons* section is shown on all train stops in the Customer section.

Clicking **Entitlement Coupons available** link or the **Edit** icon in the Order Summary panel, brings up the *Entitlement Coupons* window. It shows a list of entitlement coupons for the selected loyalty card.

All entitlement coupons are unselected by default and shown with the oldest expiry date first and the ones with no expiration last. Select which coupons to apply.

Select OK to save the selections, close the window, and refresh the entitlement coupons section of the summary panel.

Upon Submit/Refresh Order, all selected Entitlement Coupons will be passed to the OMS backend and to ORPE as qualifiers.

At final order submit, each Entitlement coupon that is successfully applied by ORPE will be:

- Redeemed in ORCE. An Order Activity record is written for each successful or failed redemption request.
- Stored in discount history coupon tables.
- Displayed in a tooltip for a specific order line in MV Order Summary and Invoice tabs. Additionally, will be included in the merchandise and shipping discount totals

within the Order Totals section of the Order Summary tab. Only displayed if *Display Order Line Discount Message (F01)* system control value is set to Y.

- Displayed in the Promotion Details drawer in MV Order Summary. Only displayed if *Display Discount on Order Recap Screen (D38)* system control value is set to Y.

Registry Name

When you add a registry item to the order, the registry name is displayed above the item in the Order Summary panel. Optionally, at the Add items to order step, you can click the registry name to display the list of items in the registry, as described under *Selecting Items and Adding them to a Registry Order* and *Add Items to Order Fields for a Registry Order*. At other steps in order entry, the registry name is display-only.

Messages

Click the messages icon ( ) to the right of an item in the Order Summary panel to open the *Messages Window (Items)*.

Delete

Select **Delete** for an item in the **Order Summary** panel to delete the item immediately. There is no confirmation message.

When you delete the main item for a set, the components are also deleted if they have already been added.

The **Delete** option is not available for a set component or other items added to the order automatically, such as through a BOGO promotion or as accompanying items. Also, the **Delete** option is not available in the Order Summary panel at the *Review Order and Verify Order Information* step, although it is available in the *Items Fields*.

If you delete all the items on the order, you cannot advance to the *Add Payment* step. You can *Cancel Entry of the Order* instead.

Coordinates

If coordinates are defined for an item, select **Coordinates** for the item in the **Order Summary** panel to add a coordinate to the order. See *Select Coordinate Items* for more information.

Personalize

This link is displayed if the item is eligible for personalization. Depending on whether personalization has already been defined for the item on the order:

- **If personalization has already been defined:** The *Personalization Information* window opens. See that window for more information on fields, options, and conditions on when this window opens.

> **Note:**
>
> You can edit or remove the personalization from the item on the order; however, if you edit the personalization, the *Personalization (Special Handling) Charge* is display-only.

- **If personalization has not already been defined:** The *Add Personalization* window opens if the item is eligible for personalization, based on the **Special Handling** setting for the Item Offer or SKU Offer. See that window for more information on fields, options, and conditions on when this window opens.

Edit

Select **Edit** for an item in the **Order Summary** panel or *Review* tab to open the *Edit Item Window*. If the quantity is a negative value, the *Edit Unverified Return Item Window* opens instead.

Edit Item Window

Use this window to edit an item on the order. Options include:

- Change the Quantity (*Order Line Quantity Ordered*). The quantity is a required field and cannot be zero or negative. To change to a negative number, the item must be deleted and added again as a negative quantity.

> **Note:**
>
> If you attempt to enter a quantity that exceeds the *Maximum Order Quantity* and you do not have authority under the *Allow Maximum Order Quantity Override* secured feature, the quantity field is highlighted in red and your entry is prevented. For example, if the *Maximum Order Quantity* is 25 and you attempt to enter a quantity of 30, a message indicates that you should enter a quantity from 1 to 25.

- Change the Price (*Order Line Price*) or set the item to *No Charge*. Either of these changes require entry of an Override Reason (*Price Override Reason*). You cannot change these fields if you do not have authority under the **Price Overrides** secured feature, or if the item is a warranty item.
- Select a different *Ship Via*. All possible ship vias are displayed, but your selection must be a valid ship via for the item and SCF.
- Select additional overrides at the Item Detail level such as Ship-To Warehouse.

  > **Note:**
  >
  > When overrides are entered on the Ship - To, the override is not reflected at the item level on the Ship - To unless you click **Next** or **Previous**.

- Select or clear *Gift Wrap* for the item if the item is eligible for gift wrap.

Click OK to apply your changes.

Express bill? You can use an express bill shipper for orders if, for example, an item has already been taken from the warehouse without first entering an order. An express ship via is designated by a setting of **Express Bill** in the **Billing** code field for the shipper.

Things to note if you specify an express-bill ship via for an order or item:

- **Authorization required:** Authorization for a credit or debit card is required before you can accept the order. If on-line authorization is not enabled, you need to authorize the card manually.
- **Affect inventory?** Orders or lines that you express bill in Contact Center order entry do not affect inventory.

Maximum order quantity or value: See the discussion under *Selecting an Order Quantity and Adding the Item to the Order* for limits on the order line quantity and order line value.

Edit Unverified Return Item Window

Use this window to edit an unverified return item on the order. Options include:

- Change the Quantity (*Order Line Quantity Ordered*). The quantity is a required field and cannot be zero or positive. To change to a positive number, the item must be deleted and added again as a positive quantity.
- Change the Price (*Order Line Price*) or set the item to *No Charge*. Either of these changes require entry of a Price Override Reason (*Price Override Reason*). You cannot change these fields if you do not have authority under the **Price Overrides** secured feature.
- Change the Return item to a Return With Exchange item.
- Change the *Return Disposition*.
- Change whether *Refund Duty Charges* are refunded or not.

Click OK to apply your changes.

Hide or Show Order Summary

At any point after in the order entry process, you can use the order summary icon () to hide or show the **Order Summary** panel. However, there is no data displayed in the Order Summary panel until you have advanced to the *Add Items to the Order* step.

Select Shipping Option and Enter Other Order Information

You advance to this step after selecting at least one item for the order and clicking Next at the *Add Items to the Order* step.

Your options at this step are:

- *Select the Customer Sold-To Name and Address for Shipping*
- *Enter a Different Shipping Address*
- *Add Another Ship-To Address*
- *Manage Multiple Ship-To Addresses*
- *Search for and Select a Pickup Location*
- *Review and Change Additional Order Information*

Select the Customer Sold-To Name and Address for Shipping

By default, the sold-to customer’s name and address are displayed. No additional action is required to ship the order to the sold-to customer’s primary address.

See the *Enter or Verify Customer Information Fields* for information on the displayed fields in the customer’s address.

Enter a Different Shipping Address

To ship the order to an address different from the customer's primary address:

Select the **Edit** option in the Ship-To Address Panel on the *Order Entry Shipping* page. The Edit Ship-To drawer opens that allows you to:

- edit the primary address details
- select an existing address book entry - see *Select an Existing Address Book Entry*
- add a new entry to the *Address Book* that can be assigned as a ship-to on the order - see *Add an Address Book Entry*
- edit an existing address book entry and save the changes to the address book - see *Update the Address Book Entry*
- delete an existing address book entry - see *Delete an Address Book Entry*
- create an one-time ship-to address

Edit the Primary Address Details

By default, the Primary Address radio button is selected. If not, select it. The Primary Address is the same as the *Customer Address* and shows the customer's name, address, phone numbers, and email address details. To edit these details:

1. Click **Edit** icon on the Primary Address panel. The customer's name and address details are shown on the *Enter or Verify Customer Information* page.
2. Update the details as necessary. Clicking **Next** advances you to the *Add Items to the Order* page.
3. Click **Next** to go to the *Shipping Options* page.

Use One-Time Ship-To Address

Enter the details of an address to use as an one-time ship-to address. Optionally, the address details can be saved to the *Address Book* for future use.

1. From the Edit Ship-To drawer, select the **One-Time Address Book** radio button.
2. Click **OK**. The One-Time Address drawer opens.
3. Enter the required one-time address name and address details. Select **Save to Address Book** to convert the one-time ship-to address details to the address book for future use. Click **OK**. You are returned to the address list.
4. Click **X** to close the address book drawer.
5. Click **OK** to close the Edit Ship-To drawer.

See *Ship-To Address Book* for more information on the Address Book.

See *Address Book Form Fields* for details.

Add Another Ship-To Address

Order ship-to addresses are addresses that are attached to the orders you are entering. The system attaches the address automatically to the current order only and you can ship to multiple shipping addresses within that order. See *Multiple Ship-To Address* for more information.

For each ship-to address, the additional ship-to information and items assigned are shown on the *Ship-To Address Panel* and in the *Order Entry Summary Panel* on the right. Drop-down fields allow address information to expand/collapse to show/hide this information for each ship-to.

Manage Multiple Ship-To Addresses

Each ship-to address can be edited. This opens the *Edit Ship-To* drawer to select or create an alternative address or to update the current details. Alternatively, you can *Delete a Multiple Ship-To Address* if there is more than one ship-to address at the time.

When **Next** is clicked, each ship-to is validated to check that each has at least one item assigned to it, otherwise, an error is shown. To resolve the error, add, move or copy items to the empty ship-to, or delete the empty ship-to.

Manage Multiple Ship-To Items

Initially, when another ship-to address is added, all items added to the order thus far are defaulted to ship-to 1 and the new ship-to will have no items for shipping. The number of items assigned for each ship-to (item count) is displayed next to the ship-to name in the ship-to address panel. Items can be moved or copied between ship-to's. All ship-to's can be edited that is, items added, modified or deleted through *Edit Item Window* or from **Edit** the *Order Summary Panel*.

- *Move/Copy Items between Ship-To's*
- *Add a New Item to a Ship-To*
- *Edit Ship-To Items*
- *Delete Ship-To Items*

Search for and Select a Pickup Location

Use this option if the customer would like to pick up the order at a store location, selected through communication with Order Orchestration.

> **Note:**
>
> Pickup is not supported if there is one or more Unverified Return lines on the order (across one or more ship to's). An error message stating "Your order cannot be switched to pick up when there is an unverified return on the order is displayed when **Pickup** toggle option on the Shipping tab is selected.

Required system control values: This option is available only with the following system control value settings:

- *Use Merchandise Locator (I38)* must be selected.
- *OROB System (K50)* must specify a system code.
- *OROB Default Location (K51)* must specify a location code.
- *Store Pickup Order Type (L33)* must be populated, or there must be at least one store cross-reference record (created through the Work with Store Cross Reference (WSCR) menu option) with the **Ship for Pickup** flag selected.
- *Merchandise Locator Distance Measurement (I39)* must be specified (miles or kilometers).

Required customer settings: The following information is required for the customer:

- The customer must have a valid email address.
- The customer's **Email Opt-In** setting must be either **Email order and promotion information** or **Email order information only**.

Required item setting: Also, any items on the order must be flagged as **OROB Eligible**, and no membership items or subscription items can be included.

Search for Pickup Locations

If all of the above requirements are met, select **Pick Up** toggle on the Shipping tab.

- If no store location has been selected, click the **Select Store** button to display the sold-to address with default search miles. See *Customer Address Fields for Pickup Location Search*. Use these fields to search for a location where the items on the order can be picked up, and the maximum search radius. The customer's current address defaults, but you can override the entries. When **Search** is clicked, a list of stores within the distance that allow pickup and ship for pickup display.

  If the item is available at the store, 'All items available in store for pickup' is displayed.

  If the item is available for ship for pickup, 'All items available to be shipped to store for pickup' is displayed.

  Select a store that is available for pickup.

  Store Pickup (store name) or Ship for Pickup (store name) displays over the sold-to address on the shipping tab and the store pickup details displays on the right.
- If a store has been selected, the Order Summary Panel address section shows the type of pickup (Store Pickup or Ship for Pickup), the name and address of the store, and the Totals when the toggle next to Store Pickup label is expanded.

For more information:

- **Background on searching for locations:** *How does Order Orchestration Select the Locations to Include?*, *Merchandise Locator for Different Types of Items*, and *Merchandise Locator Troubleshooting* for more information on searching for locations.
- **Details on the communication with Order Orchestration:** *Product Availability Request Message* and *Product Availability Response Message*.

Optionally, edit any of the *Customer Address Fields for Pickup Location Search* and click **Search**.

Select a Pickup Location

The eligible pickup locations are displayed below in ascending order by distance, indicating whether the items are:

- Currently available in the location for pickup (*Store Pickup Order*), or
- Can be shipped to the store for pickup (*Ship-for-Pickup Order*).

The distance from the customer's specified search address is also indicated for each location.

Locations are displayed only if they could fulfill all items on the order, and if there is a store cross reference record for the location.

Click a location to select it for the order. See *Eligible Pickup Location Fields* for more information.

A message indicates if there are no locations in the specified search radius that could fulfill all items.

Review and Change Additional Order Information

Optionally, use the *Shipping Details Fields* or *Additional Order Details Fields* to change any of the additional order information. See these fields for details.

Gift order? When you select the *Gift* Order flag, the *Messages Window* opens so that you can enter a gift message.

Express bill? You can use an express bill shipper for orders if, for example, an item has already been taken from the warehouse without first entering an order. An express ship via is designated by a setting of **Express Bill** in the **Billing** code field for the shipper.

Things to note if you specify an express-bill ship via for an order or item:

- **Authorization required:** Authorization for a credit or debit card is required before you can accept the order. If on-line authorization is not enabled, you need to authorize the card manually.
- **Affect inventory?** Orders or lines that you express bill in Contact Center order entry do not affect inventory.

Tax exemption? Both the *Tax Code* and a current *Tax Identification* number are required if the customer is exempt from tax or flagged for resale. If one of these fields is populated but not the other, or if the Tax Identification number has expired, you will not be able to accept the order.

Note that entering a Tax identification code in Contact Center order entry does not update the customer record with the entered code.

Navigation Options at the Select Shipping Option and Other Details Step

Click **Previous** to return to the *Add Items to the Order* step.

Click **Next** to advance to the *Review Order and Verify Order Information* step.

Select **Cancel** to *Cancel Entry of the Order*.

- If you had selected an existing customer and applied any updates at the *Enter or Verify Customer Information* step, your changes are retained.
- If you had begun creation of a new customer, the customer record is not retained.

Review Order and Verify Order Information

You advance to this step after clicking **Next** at the *Select Shipping Option and Enter Other Order Information* step.

Review information: Use this step to review the information on the order before entering payment information. See *Verify Order Information Fields (Review Step)* for field definitions.

This step displays any repricing, applied discounts, and calculated freight and tax. See *Coupons Fields* for more information.

If using QAS: If you are using QAS, the updated sold-to or shipping address is displayed. See the **Use QAS Address Interface (I67)** system control value in the Implementation Guide for more information.

Item added? If the order qualifies for an item that is added automatically, such as a BOGO promotion with an item flagged as Free Auto Add, the item is listed at this step. Any unverified return lines are shown as a negative quantity.

Edit information: You can update any of the information on the order at this step. These options are described below. You then need to use the *Refresh Order* option to update the order and verify all required information is valid.

If you remove items at this step: If you change the information for the order at this step, such as removing any items, you need to select the **Refresh** option to display the updated order, including any free gifts or discounts that now apply to the order. For example, if you remove an item or lower the quantity of an item that qualified the order for a discount or a free gift, the information displayed is not updated until you select **Refresh**.

Tax Interface error? A warning at the top of the page indicates if there was an error calling the tax interface. Also, if the *Use Standard Tax Calc if Tax Interface Communication Fails (J13)* system control value is selected, a message indicates that the standard tax calculation is used. However, you can still complete entry of the order.

Errors? A message at the top of the page indicates if there are any errors on the order. You cannot advance to the *Add Payment* step and submit the order without correcting any existing errors and then using the *Refresh Order* option to update the order and verify all required information is valid.

Error examples: Possible errors at the header or detail level include:

- Invalid postal code for a new customer or ship-to address.
- Invalid ship via for PO box if the ship via on the order does not support delivery to a PO box.
- Invalid promotion code.
- Invalid ship via for SCF, indicating that the ship via is not valid for the postal code.
- Invalid ship via for item, indicating that the item requires a ship via override to a different ship via.
- Item class restriction for the city on the shipping address.
- Item class restriction for the customer class.
- Email address is missing or invalid opt-in, indicating that there is a virtual stored value card on the order but no email address available.
- An ineligible item was added to a *Store Pickup Order* or *Ship-for-Pickup Order*. For these orders, items must be flagged as **OROB Eligible**, and must not be membership or subscription items.
- An item on the order is assigned a personalization code that was set up incorrectly. This can occur if, for example, a custom special handling format uses an additional charge code that has the **Suppress S/H Window** flag selected.
- Merchandise total exceeds *Maximum Order Line Value*, if you do not have authority under the *Allow Maximum Order Line Value Override* secured feature.

Example: A red **X** at the related order entry step at the top of the page indicates invalid data for that step. For example, the **Customer Information** step at the top of the page is preceded by a red **X** if the customer address is invalid. Also, the errors are highlighted at the **Verify Order Information** step.

After you correct any errors, the error messages remain on the page until you use the *Refresh Order* option and the system confirms that the errors have been corrected.

> **Note:**
>
> You cannot complete the order if the *Price Codes (D93)* system control value is selected and you are using the loyalty and awards integration with Customer Engagement. See *Customer Engagement Loyalty Integration* in the Classic View online help for an overview.

Use the Prompt to Join Loyalty

Loyalty prompt options: A prompt to join loyalty is displayed below the page title (Verify order information), providing the following options:

- **Never:** Do not ask the customer again about joining loyalty. In this case, Order Administration sends a Customer Engagement Update Customer Request to update the ORCE_LOYALTY_PROMPT_ATTRIBUTE setting for the customer to FALSE so that Order Administration will not prompt the customer again to join the Loyalty program.
- **Not Now:** The customer is not joining loyalty now, but can be prompted again in the future. Order Administration does not send an update to Customer Engagement.
- **Enroll:** Enroll the customer in loyalty. See *Updates at Loyalty Enrollment*, below, for information on the updates that take place when the customer enrolls.

Displayed when? The prompts are displayed only if:

- the *ORCE Customer Integration (L37)* system control value is set to INTERACT, and
- the *Use ORCE Loyalty (M06)* and *Prompt to Join Loyalty (M07)* system control values are selected, and
- the customer has an ORCE customer ID and is not already a loyalty member, and has not previously requested to stop prompting for loyalty membership, such as by selecting the **Never** option at the prompt.

Prompt wording: The ORCE_LOYALTY_REG_MESSAGE property (PROP) defines the wording of the prompt message.

You can also enroll the customer in loyalty when prompted at the *Customer Order List*, *Customer Items List*, or *Customer Purchase History List*, or through the process described under *Enroll the Customer in a Loyalty Program* if the customer is not already enrolled.

Apply awards? If awards are applied when you enroll the customer, you can apply the awards to the current order. See *Apply Awards* for more information.

Updates at Loyalty Enrollment

When you confirm the enrollment of the customer in loyalty:

- Order Administration sends a Customer Engagement Loyalty Generate Card Request to Customer Engagement.
- Customer Engagement uses the information in the Loyalty Generate Card Request to associate and activate a new loyalty card for the customer.
- Customer Engagement returns the Customer Engagement Loyalty Generate Card Response to Order Administration, containing the customer's loyalty card number.

- Order Administration:
  - generates the Loyalty Registration Notification email to send to the customer. This email contains the loyalty card number assigned to the customer; see *Oracle Retail Customer Engagement Loyalty Registration Notifications* for the setup required to generate the notice and see Oracle Retail Customer Engagement Loyalty Registration Notification Sample and Contents for a sample email. See *Working with E-Mail Notification Templates (WEMT)* in the Classic View online help for more information.
  - creates a record in the Customer Note table indicating a Customer Engagement Loyalty Registration Notice has been sent to the customer: Loyalty Reg Notice to acustomer@EXAMPLE.com. You can review customer notes on the Edit Customer Notes Screen. The note is written even if the system generates the Outbound Email XML Message (CWEmailOut) rather than an actual email, or if the email cannot be relayed if, for example, there is a problem with the destination email address.
- Order Administration sends the Customer Engagement Update Customer Request to update the ORCE_LOYALTY_PROMPT_ATTRIBUTE setting for the customer to FALSE so that Order Administration will not prompt the customer again to join the Loyalty program.
- Customer Engagement returns the Update Customer Response indicating whether the update was successful.
- Order Administration sends a Customer Engagement Loyalty Card Request to Customer Engagement, requesting the details of the loyalty card.
- Customer Engagement returns the details of the loyalty card in the Customer Engagement Loyalty Card Response.

Order Administration uses the information in the Loyalty Card Response to display the loyalty card number and its associated points and awards on the Customer Selection screen.

If communication fails:

- If a connection could not be made to Customer Engagement in order to enroll the customer in the loyalty program, the system displays an error message similar to the following: No response from ORCE-card not generated.
- If the value in the *ORCE Loyalty Card Prefix (M08)* or *ORCE Loyalty Card Series Sequence Number (M09)* system control value is not valid in Customer Engagement, the system displays an error message similar to the following: No response from ORCE-card not generated.

Apply Awards

Select **Awards** to select an award balance to apply to the order. Each type of award available to the customer in the award program is displayed. If the customer is enrolled in more than one card program, then only the awards related to the program selected at the *Select Card Window* are displayed. To support multiple ship-to addresses, each award under the selected loyalty card repeats per ship-to.

Available when? The **Awards** option is available only if:

- The price method for the source code on the order header is set to Regular Plus Reprice.
- The *Prorate Dollar Discounts and Coupon (D90)* system control value is selected.

- The merchandise total for the order is greater than zero.
- There is a loyalty award balance greater than zero available for the customer.

Completing this window: Enter the *Amount to Apply* in order to apply the award to the order, reducing the merchandise total by the entered amount by prorating the award against the discountable order lines. If there are multiple award totals displayed, you can enter an amount for more than one award type. Note that the balance displayed at the top of the page is not updated at this time.

Note:

- Your entry cannot exceed the displayed *Award Balance* or the *Merchandise* total.
- If you change the card or the award amount after applying the awards, select Refresh to see the new calculation applied to the order.
- If you make changes to the order after applying the award, such as adding or removing an item, select Refresh to confirm that the order is still eligible for the award amount and to recalculate the new merchandise total.
- Awards do not apply to non-discountable items or sale items if the *Exclude Sale Items When Prorating Discounts (I65)* system control value is selected.
- Awards do apply to order lines with a price override reason.
- The Award Applied amount within the Order Total section of the Order Summary panel is the sum of all awards applied across all the ship-to's. Add an Award Applied amount within each Ship-To totals section of the Order Summary panel is the sum of the awards applied to that specific ship-to.

After you accept the order, the *Amount to Apply* is subtracted from the *Award Balance*.

Edit Customer Information

Select **Edit** for **Customer Information** to edit the name and address information for the sold-to customer on the order. Typically, if there is an error related to the customer information, this error occurs when you create a new customer. You return to the *Enter or Verify Customer Information* step.

For more information: See *Select a Customer* and *Create a New Customer* for background, and see *Customer Results Fields* for details on fields.

Verify changes: When you have completed update of the customer information, click **Next** through the following steps to return to the *Review Order and Verify Order Information* step, and then use the *Refresh Order* option to verify that your changes are valid.

Work with Additional Charges for a Ship-To Order

The *Additional Charges* button can be found:

- In the **Shipping** tab, for every Ship-To in the Ship-To Details section, before the *Messages* button.
- In the **Review** tab, for every Ship-To, before the *Add Items* button.

Select the **Additional Charges** option to advance to the *Additional Charges* panel.

> **Note:**
>
> The *Additional Charges Access (A24)* secured feature must be set to ALLOW to add, edit, or delete the additional charges.
>
> The sum of all manually entered negative additional charges cannot exceed the value of the *Negative Additional Charge Limit (E49)* system control value if the *Override Negative Additional Charge Limit (A60)* secured feature is not set to ALLOW. An error displays on the Add and Edit Additional Charge windows if the authority is EXCLUDE.
>
> When an Additional Charge Code has a default amount, the amount is editable only when the *Enter Amount for Order Additional Charge (A80)* secured feature is set to ALLOW and *Restrict Additional Charge Amount if Default Charge (F43)* system control value is set to No.
>
> When the *Enter Amount for Order Additional Charge (A80)* secured feature is set to EXCLUDE, additional Charge Codes without a default amount are hidden. Those with an amount display but cannot be edited.

Edit Ship-To Information

Select **Edit** for the **Ship To** to edit the shipping and additional information for the order. You return to the *Select Shipping Option and Enter Other Order Information* step.

This option is not available if this is a *Store Pickup Order* or *Ship-for-Pickup Order*.

For more information: See *Select Shipping Option and Enter Other Order Information* for background, and see *Ship To Other Address Fields*, *Shipping Details Fields*, and *Additional Order Details Fields* for details on fields.

Verify changes: When you have completed update of the shipping and other details fields, click **Next** to return to the *Review Order and Verify Order Information* step, and then use the *Refresh Order* option to verify that your changes are valid.

Edit Pickup Information

Select **Edit** for the **Pickup Location** to edit the information for the location where the customer will pick up the order. You return to the *Select Shipping Option and Enter Other Order Information* step, where you edit any shipping details as well as search for a different location.

This option is available only if this is a *Store Pickup Order* or *Ship-for-Pickup Order*.

For more information: See *Search for and Select a Pickup Location* for background, and see ‘*Customer Address Fields for Pickup Location Search*, *Eligible Pickup Location Fields*, *Shipping Details Fields*, and *Additional Order Details Fields* for details on fields.

When you select **Edit** for the **Pickup Location**, you can also:

- Change the order to ship to the sold-to customer address or a ship-to address, rather than using a store location for pickup. See *Select the Customer Sold-To Name and Address for Shipping* and *Enter a Different Shipping Address* for details.

- Edit the shipping details and additional order details fields. See *Review and Change Additional Order Information* for details.

Verify changes: When you have completed update of the shipping and other details fields, click **Next** to return to the *Review Order and Verify Order Information* step, and then use the *Refresh Order* option to verify that your changes are valid.

Add Items

Select **Add Items** to return to the *Add Items to the Order* step.

For more information: See *Add Items to the Order* for background, and see *Add Items to Order Fields* for details on fields.

Verify changes: When you have completed update of the shipping and other details fields, click **Next** to return to the *Review Order and Verify Order Information* step, and then use the *Refresh Order* option to verify that your changes are valid.

> **Note:**
>
> The*Edit* and*Delete* options for an item on the order are available from the actions menu (⋮).

Check Inventory for an Item/SKU

Select **Check Item Availability** from the actions menu (⋮) in the Items panel for an order line to check availability.

- If the *Use Merchandise Locator (I38)* system control value is unselected or if the *Use Merchandise Locator (I38)* system control value is selected but the item is not eligible for the merchandise locator, you advance to the *Inventory Information* window.
- If the *Use Merchandise Locator (I38)* system control value is selected and the item is eligible for the merchandise locator, you advance to the *Inventory Information (Merchandise Locator)* window.

> **Note:**
>
> - For set items, the **Check Item Availability** option is available for the set component item and not the main set item.

Review or Edit Personalization for an Item

If personalization has already been defined for the item, click the additional charge code and description (for example, M - MONOGRAMMING) to open the *Personalization Information* window. See that window for more information on fields, options, and conditions on when this window opens.

You can edit or remove the personalization from the item on the order.

Add Personalization for an Item

If personalization has not already been defined for the item, but the item is eligible for personalization based on the **Special Handling** setting for the Item Offer or SKU Offer, click **Personalize** below the item or in the Order Summary panel to open the *Add Personalization* window. See that window for more information on fields, options, and conditions on when this window opens.

Edit Additional Details

Select **Edit** for **Additional Order Details** to edit the additional information for the order. You return to the *Select Shipping Option and Enter Other Order Information* step.

For more information: See *Select Shipping Option and Enter Other Order Information* for background, and see *Additional Order Details Fields* for details on fields.

Verify changes: When you have completed update of the additional details fields, click **Next** to return to the *Review Order and Verify Order Information* step, and then use the *Refresh Order* option to verify that your changes are valid.

Apply Coupon Code

The Coupons section is displayed in the Order Summary panel when system control value *Use ORPE Promotion Engine (M77)* and a *Allow Manual Entry of Promotion Code (I63)* are both enabled. The **Add Coupon Code** button is shown when the source code used at order entry has a price method of *Reg Plus Reprice* and when system control value *ORCE Organization Descriptor (L50)* is set to ws, and a *Default Location for ORCE Integration (K69)* set.

Click **Add Coupon Code** from the Coupons section.

Enter a coupon code and select **Add**.

No validation is done for validity on the coupon codes value entered (this will occur during Review/Submit).

Enter further coupon codes as required. Click **Done** when finished entering codes. You are returned to the Order Entry screen. The Coupons section in the Order Summary panel will show the coupon code count. Use the Edit (pencil) link to change or delete the coupon code as necessary.

Select **Refresh Order**.

Entered coupons are evaluated during *Review Order and Verify Order Information* step, rather than immediately upon closing the window.

If you have authority to the *Allow Redeemed ORCE Serialized Coupon to be Overridden* secured feature, you can submit a previously redeemed serialized coupon to ORPE by clicking the **Attempt Reuse** link. The Attempt Reuse confirmation window opens. Click **OK** to confirm. The Coupon has already been redeemed message shown under the coupon is removed. After the next order refresh, it will try to apply it.

Refresh Order

The **Refresh Order** option at the top of the *Review Order and Verify Order Information* is enabled each time you update any information on the order.

You need to select this option to update information, such as order totals, after applying any changes to the order, and to verify that the current order information is valid. The **Next** button is not enabled until you refresh the order.

When refreshing the order information, the system verifies that all the current information on the order is still valid. See *Review Order and Verify Order Information* for examples of possible errors.

Even if you did not change any information, it is possible for new errors to occur, if, for example, the requested quantity of an item is no longer available at the selected pickup location, or the location itself is no longer available. In this situation, you would need to return to the *Select Shipping Option and Enter Other Order Information* step and update the order by either searching for a new pickup location, or changing the order to ship to the customer.

If using QAS: If you are using QAS and QAS updated the sold-to or shipping address, the updated address is displayed. However, if there are any errors that need to be corrected, the updated address may not be displayed until after you correct any errors.

See the *Use QAS Address Interface (I67)* system control value in the Classic View online help for more information on using QAS.

Navigation Options at the Review Order and Verify Order Information Step

Click **Previous** to return to the *Select Shipping Option and Enter Other Order Information* step.

Click **Next** to advance to the *Add Payment* step.

Select **Cancel** to *Cancel Entry of the Order*.

- If you had selected an existing customer and applied any updates at the *Enter or Verify Customer Information* step, your changes are retained.
- If you had begun creation of a new customer, the customer record is retained.

Add Payment

Use this step to add one or more payment methods to the order.

Multiple payment methods? The *Allow Multi Pay Types (A74)* system control value controls whether you can define multiple payment methods for an order. You need to select the Split Payment option when you enter the payment method on the order, and also specify the *Amount to Charge*.

Identifying the payment method and card type: Cash/check, PayPal, external payment service gift cards, or Customer Engagement stored value cards payment methods are defined in the **Work with Pay Types (WPAY)** menu option. Possible options in Work with Pay Types are:

- **Cash/check:** has a **Pay Category** of **Cash/Check**. See *Add a Cash/Check Payment*.
- **Gift card:** Has a **Pay Category** of **Credit Card** and a **Card Type** of **Stored Value**. See *Add a Gift Card (Stored Value Card) Payment*.

Credit and debit cards are defined through the Payment Configurations page.

When you select a payment method, the additional required and optional fields are displayed in the Add Payment window, as described below.

If the pay type is restricted: An error message indicates if you try to enter a restricted pay type, such as a pay type that matches the *Order Broker Payment Type (K98)* system control value.

> **Note:**
>
> Pay type records that have a **Card Type** of **Wallet** as viewed in the Classic View **Work with Pay Types** (WPAY) are excluded from the list of payment methods shown in *Add Payment*. Additionally, any pay type with associated to the PayPal (PPL) authorization service is not displayed.

Use Auto Authorization Interface (C14) system control value to hide EFTConnect payment methods so they are not shown on the Payment Method drop down list and hence cannot be selected for payment.

Catch-all payment required: If there are any credit, debit or gift card pay types on the order, one must be designated as the catch-all payment method, with no *Amount to Charge* specified, before you can submit the order. The system uses this card to charge the total balance remaining on the order after any other payment method has been charged. Select *Split Payment* when adding a payment method to the order to indicate that there will be additional payment methods. Otherwise, the order balance defaults as the amount to charge.

Credit or debit card required for store pickup or ship-for-pickup orders: Only credit or debit card payment methods are allowed when:

- The order is a *Store Pickup Order*, and the *Collect Payment at POS for Store Pickup Orders (M16)* system control value is selected.
- The order is a *Ship-for-Pickup Order*, and the *Collect Payment at POS for Ship To Store Orders (L60)* system control value is selected.

You can also add a manual authorization for a credit or debit card, check the balance for a gift card, edit a cash or check payment method, and view, delete, or deactivate a declined payment method. Each option is described below.

Add a Cash/Check Payment

1. At the *Add Payment* step, select **Add Payment** to open the *Add Payment* window.
2. Select a cash/check payment method from the *Payment Method* drop down box. The system identifies a payment as cash/check if its *Pay Category* in the *Work with Pay Types (WPAY)* menu option is set to **Cash/Check**. After you select a cash/check payment, the system displays additional fields required to create a cash/check payment.
3. Enter an *Amount to Charge* amount. It does not need to be equal to the order total.
4. Select **OK** to display the additional fields related to the payment method.
5. Optionally, enter a *Routing Number*, *Account Number*, and *Check Number*.
6. Select **OK** to add the payment method to the order. The system validates your entries.

If the payment passes validation, the system:

- Displays a message indicating the payment was added to the order.

- Displays the newly added payment in Payment Method table.

A *Snackbar Notification* indicates if the amount to charge is greater than the order total.

For more information: See *Add Payment Options* for more information and background.

Add a Credit Card or Debit Card Payment

Oracle Retail *EFTConnect* provides credit card validation and processing through *Account Providers* such as CyberSource, Adyen, external payment services (EPS) and other custom Oracle Payment Interface (OPI) payment services.

You need to configure your merchant account and set up all credit card or debit card payment methods through the Payment Configurations page. You cannot create or modify credit card or debit card payment methods through the Work with Pay Types (WPAY) screen in Classic View. See the Payment Configurations page for more information.

1. At the *Add Payment* step, select **Add Payment** to open the *Add Payment* window.
2. Select a credit or debit card payment from the *Payment Method* drop down box. Any payment method that is not allowed to be added, like PayPal or Wallets, are not available in the list. Optionally select *Split Payment* if there will be one or more additional payment methods on the order.
3. Optionally, enter an *Amount to Charge*. This amount does not need to be equal to the order total. Leave this field blank if the payment method is the catch-all payment on the order.
4. Select **OK** to display the additional fields related to this payment method. The form displayed is from the payment provider. The content varies depending on whether CyberSource, Adyen, EPS, or OPI custom payment provider was selected as the *Account Provider*. Enter the required details such as a *Card Number*, the *Expiry Month* (MM format) and *Expiry Year* (YY format), the card's *Security Code* (CVV/CID/CVC) and other fields as applicable.

   If you did not select *Split Payment*, the order total is set as the amount to charge for the selected payment method.
5. Select **Pay** to add the payment method to the order.

   The card data is validated by the payment provider and a temporary token is returned if successful. The system displays a message indicating the payment was added to the order. Authorization occurs automatically when you submit the order. See *Submit Order*.

If an error occurs whilst loading the service or after selecting **Pay**, and the payment provider form cannot be displayed, retry or select a new form of payment. You can close the window, select Edit, or select the hyperlink in the message.

- If the window is closed, payment is not added and the Payment page is displayed.
- Selecting Edit allows you to retry or change the payment method.
- Selecting the hyperlink in the error message tries to reload the form.

If the error persists you can retry, select a different payment method, or cancel the order. See the *Payment Configurations* page for more information.

Add a Gift Card (Stored Value Card) Payment

1. At the *Add Payment* step, select **Add Payment** to open the *Add Payment* window.
2. Select a gift card payment from the *Payment Method* drop down box and optionally select *Split Payment* if there will be one or more additional payment methods on the order.

3. If you selected *Split Payment* and plan to enter one or more additional payment methods, enter an *Amount to Charge*.
4. Select **OK** to display the additional fields related to this payment method. If you did not select *Split Payment*, the order total is set as the amount to charge for the selected payment method.
5. Enter a *Card Number*. The system validates the card number against the credit card length, leading digits, and modulus check settings defined for the payment method in the **Work with Pay Types (WPAY)** menu option.
6. Enter a *Start Date* in MM/YY format. Displayed only if the **Require Start Date** field is selected for the payment method.
7. Enter an *Expiration Date* in MM/YY format. Required only if the **Require Expiration Date** field is selected for the payment method.
8. Enter an *Issue Number*. Displayed only if the **Require Issue #** field is selected for the payment method.
9. Enter a *Card ID Number* if one is defined for the gift card.
10. Optionally, select the *Manual Authorization* field to apply a manual authorization to the gift card payment. You can then complete the *Manual Authorization Amount*, *Authorization Date*, and *Authorization Number*.

> **Note:**
>
> - The *Manual Authorization* field is available only if you have authority to the *C/C Authorization Field Access (A25)* secured feature.

11. Select **OK** to add the payment method to the order. The system validates your entries. An error message indicates if:
    - The card number is blank.
    - The card number does not match the length defined in the **Credit Card Length** field for the payment in the **Work with Pay Types (WPAY)** menu option.
    - The card number does not pass the modulus check validation defined in the **Modulus Check** field for the payment in the **Work with Pay Types (WPAY)** menu option.
    - The leading digits of the card number do not match the leading digits defined in the **Leading Digits** field for the payment in the **Work with Pay Types (WPAY)** menu option.
    - The **Start Date** is blank and the **Require Start Date** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option.
    - The **Expiration Date** is blank and the **Require Expiration Date** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option.
    - The **Issue Number** field is blank and the **Require Issue #** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option.
    - The **Manual Authorization** field is selected and the **Manual Authorization Amount** field is blank.

- The **Manual Authorization** field is selected and the **Authorization Number** field is blank.

12. If the stored value (gift) card payment passes validation, the system:
    - Displays a message indicating the payment was added to the order.
    - Displays the newly added payment in the Payment Method table. The charge sequence for the payment is set to 2.

See *Online Authorization Processing* for more information on processing, updates, and displayed messages when the payment method uses online authorization.

Add a Manual Authorization for a Card

Select **Add Authorization** from the **Actions** menu (⋮) to open the *Add Authorization* window. This option is available for a credit card, debit card, or stored value (gift) card.

> **Note:**
>
> The *Manual Authorization* field is available only if you have authority to the *C/C Authorization Field Access (A25)* secured feature.

1. Enter an *Authorization Amount* (*Manual Authorization Amount*).
2. Enter an *Authorization Date*.
3. Enter an *Authorization Number*.
4. Optionally, enter the *Authorization Request ID*. If the authorization service, such as CyberSource, requires the request ID and it is not entered, the subsequent authorization will fail.

    > **Note:**
    >
    > The authorization is not displayed on the Payment Method Details window until the order goes through billing.

5. Select **OK**. The system validates your entries. An error message displays if the Expiration Date for the order payment method has passed. In this case, you will need to update the Expiration Date before applying the authorization.
6. If the entries pass validation, the system displays a message indicating the payment was updated.

See *Online Authorization Processing* for more information on processing, updates, and displayed messages when the payment method uses online authorization.

Check a Gift Card's Balance

When adding a gift card to the order: After selecting a gift card payment method, select **Check Gift Card Balance** from the **Actions** menu (⋮) at the *Add Payment* window to open the *Check Gift Card Balance* window.

For a gift card that is already on the order: Select **Check Gift Card Balance** from the **Actions** menu (⋮) for a gift card payment method on the order.

After you select **Check Gift Card Balance** the Check Gift Card Balance window opens.

1. Enter a valid gift card number in the *Card Number* field.
2. If the gift card is assigned an ID number, enter the ID in the *Card ID Number* field.
3. Select **Check Balance**. The system validates your entries. An error message displays if:
   - The card number is blank.
   - The card number does not match the length defined in the **Credit Card Length** field for the payment in the **Work with Pay Types (WPAY)** menu option.
   - The card number does not pass the modulus check validation defined in the **Modulus Check** field for the payment in the **Work with Pay Types (WPAY)** menu option.
   - The leading digits of the card number do not match the leading digits defined in the **Leading Digits** field for the payment in the **Work with Pay Types (WPAY)** menu option.
4. The system looks at the **Authorization Service** field defined for the gift card pay type to determine the service bureau that performs balance inquiries for the gift card pay type. An error message indicates if an authorization service is not defined for the payment in the **Work with Pay Types (WPAY)** menu option.
5. The system sends a balance inquiry request to the service bureau.
   - If the response returns an error, the system displays an error message at the top of the page.
   - If the vendor response returned matches a vendor response in the CC Vendor Response table, the system displays the message defined for the vendor response.
   - If the vendor response returned does not match a vendor response in the CC Vendor Response table, the system displays a message indicating the vendor response is not recognized and provides the error returned in the balance inquiry response.
   - If a response is not received from the service bureau, the system displays a message indicating the balance inquiry could not be performed.
   - If the response includes the card balance amount, the system displays the *Card Balance* at the bottom of the page.

> **Note:**
>
> The **Check Gift Card Balance** link is available only if you have authority to the **Stored Value Card Balance Inquiry (MSVB)** menu option.

View Payment Details

Select **View Details** from the **Actions** menu (⋮) for a payment method to open the **Payment Method Details** window. See *Payment Method Details Window Fields* for more information on the fields displayed for each payment type.

Edit Payment

Select **Edit** from the **Actions** menu (⋮) for a payment method to open the **Edit Method** window. This option is available only for a cash/check payment method.

An **Edit** option is also available from the *Add Payment* window when you are first entering the payment method. Selecting the **Edit** option from this window clears any entries you have made in the window. You return to the initial view of the **Add Payment** window, with just the *Payment Method* and *Amount to Charge* retained. You can change both these fields.

Delete Payment

Select **Delete** from the **Actions** menu (⋮) for a payment method, and then click **OK** at the confirmation window, to delete it from the order.

Deactivate Payment

In the *Payment Information Panel*, from the **Actions** menu (⋮), select the **Deactivate** option for a payment method on the order. The system advances you to the **Confirm Deactivation** window, where you can remove a payment method.

At the **Confirm Deactivation** window, select **Yes** to deactivate the payment; otherwise, select the **No** option to cancel the deactivation.

If the deactivated payment method was the only payment method on the order, you will need to add another payment method before you can submit the order.

> **Note:**
>
> You cannot change or reactivate a deactivated payment type.

Navigation Options at the Add Payment to Order Step

Click **Previous** to return to the *Review Order and Verify Order Information* step.

> **Note:**
>
> If you select Previous, any payment information currently on the order is removed. You will need to re-enter payment information to complete entry of the order.

Select **Cancel** to *Cancel Entry of the Order*.

- If you had selected an existing customer and applied any updates at the *Enter or Verify Customer Information* step, your changes are retained.
- If you had begun creation of a new customer, the customer record is retained.

Submit Order

After you complete payment entry at the Add Payment to Order step and select **Submit Order**, for payments configured through EFTConnect, an authorization request is submitted automatically using the temporary token. If the payment passes authorization:

- The order is saved.
- If you have defined a pop up window message for the vendor response received from the merchant account, the system displays the *Authorization Response* window; otherwise, the system displays a message indicating the authorization was processed.
- If the returned vendor response is associated with a hold reason code, the system places the order on hold and displays a message indicating the order has new holds.
- A *Snackbar Notification* indicates:
  - The assigned order number.
  - The customer name.
  - The customer number. If the *ORCE Customer Integration (L37)* system control value is set to INTERACT and the *Use Oracle Retail Customer Engagement Customer Number on Search* flag in Work with Contact Center (WWCC), this is the Customer Engagement ID. Otherwise, it is the Order Administration customer number.
  - Whether the order status is held or closed; otherwise, the order status is open.

  If the entire order is an unverified return, it is immediately sent through billing and once completed the order is updated to closed status. The item status is *Express Bill* during processing.

  You can click the *Snackbar Notification* to advance to the *Order Summary* page to review or work with the order; otherwise, select **Dismiss** in the snackbar message.

If the payment does not pass authorization such as:

If the temporary form token expires or the system times out before a response is received when submitting an order for payment authorization, the pay method is removed and you must re-enter payment.

If a response code of 31 (an error with the form token) is returned for the form token, or there is a communication issue during authorization, the order is put on hold.

See *Online Authorization Processing* for more information on processing, updates, and displayed messages when the payment method uses online authorization.

When a Card is Declined

When a card is declined, the order is saved with the declined card and card token. You can accept or edit a declined payment, or edit the order.

- To accept an order from a declined card payment, select **Accept Order**. The order is created and places the order on hold.
- To pay with a different payment method, select **Edit Order**, then Deactivate the declined payment. Select a new payment method.

- To edit the order:
  1. Select **Edit Order**, then select the **Previous** page to return to the Review step.

     > **Note:**
     >
     > If you select **Previous**, any payment information currently on the order is removed. You will need to re-enter payment information to complete entry of the order.

  2. Edit the order, then select **Refresh Order**.
  3. Continue to Add Payment to add the payment information.
  4. Select **Submit Order**.

Errors? If there are any errors on the order that were not previously caught, a message window opens. Depending on the type of error:

- The **Errors Exist** window opens if there is an error that you can correct and resubmit the order. This window indicates that you need to click the **Previous** button to review and correct errors. For example, you can return to the *Select Shipping Option and Enter Other Order Information* step to correct an issue with the SCF and selected ship via.
- The **Confirm Cancellation** window opens if there is an error that prevents the order from being completed. For example, this situation occurs if there is an issue with the credit card used on the order such as a declined card. You can:
  – Click **Cancel** to return to the order and correct it. Then, after you return to the *Review Order and Verify Order Information* step, you will need to use the **Refresh Order** option to update the order.
  – Click **OK** to cancel the order and return to the *Find and Select Customer* step. The order is rejected and not saved in a canceled status.

Cancel Entry of the Order

To abandon entry at any point in the order entry process, select **Cancel**, close the page, or select the option to advance to Classic View, and then confirm your choice at the confirmation window. No record of the order is retained.

If you abandon the order after selecting or creating a customer and adding one or more items to the order, confirmation at an additional window is required, and no record of the order is retained.

If the Session Ends During Order Entry

A session can end during Order Entry if, for example:

- The session times out due to inactivity.
- The browser closes unexpectedly.
- The user logs out.
- The user returns to Classic View.

The order is retained in error status if you have advanced to the *Review Order and Verify Order Information* step, and:

- The session ends due to a timeout.

- The browser closes unexpectedly.
- You log out.

You can use the Purge Suspended Orders option (PSOR) in Classic View to purge orders that remain in error status, or use *Unlock Order* to unlock an order that remains locked.

Fields in Order Entry

Purpose: The information is displayed in order entry:

- *Find and Select a Customer Fields*
  - *Search for Customer Fields*
  - *Customer Results Fields*
- *Enter or Verify Customer Information Fields*
  - Duplicate Customers Found Fields
- Select Card Fields
- *Add Items to Order Fields*
  - *Add Items Search Field*
  - *Item Search Results Fields*
  - *SKU Search Results Fields*
  - *Add Items to Order Fields for a Registry Order*
  - *Add Unverified Return Item Fields*
  - *Personalization Fields*
  - *Order Settings Window*
  - *Messages Window Fields (Order-Level or Item-Level)*
  - *Edit Item Window Fields*
- *Order Summary Panel Fields*
  - *Customer Summary Fields*
  - *Entitlement Coupons Fields*
  - *Coupons Fields*
  - *Order Total Fields*
  - *Shipping Fields*
  - *Pickup Location Fields*
  - *Items Fields*
- *Select Shipping Option and Enter Other Details Fields*
  - *Ship To Primary Address Fields*
  - *Ship To Other Address Fields*
  - *Customer Address Fields for Pickup Location Search*
  - *Eligible Pickup Location Fields*

For more information:

- *Order Entry* for an overview of the order entry process.
- *Order Entry Options* for step-by-step instructions on the actions you can perform in order entry.

Find and Select a Customer Field

Search for Customer Fields

The fields displayed are based on the **Search by Customer Information Fields** selected in Work with Contact Center (WWCC).

You may need to click **Additional Customer Search Fields** to display them all if the **Number of Customer Quick Search Fields** specified in Work with Contact Center is lower than the number of **Search by Customer Information Fields**.

Email Address: Your entry must be a full, correctly formatted email address. The results display all customer records associated with the entered email address.

Phone Number: Your entry must be a complete area code, but formatting is optional. For example, any of the following entries will find customer records with a matching phone number:

- 5085550100
- 508 555 0100
- (508) 555-0100

First Name: Search results include customers whose first names start with your entry or match it exactly, and searching is not case-sensitive. For example. if you enter El, the search results might include customers whose first names are ELLEN or ELEANOR.

Last Name: Search results include customers whose names start with your entry or match it exactly, and searching is not case-sensitive. For example. if you enter `jo`, the search results might include customers whose last names are JONES or JOHNSON.

Company Name: Search results include customers whose company names start with your entry or match it exactly, and searching is not case-sensitive.

Postal Code: Search results include customers whose postal or zip codes start with your entry or match it exactly.

Customer Number: Your entry needs to be an exact match to an existing customer. Your entry needs to be an exact match to an existing customer. If the *ORCE Customer Integration (L37)* system control value is set to INTERACT and the *Use Oracle Retail Customer Engagement Customer Number on Search* flag in Work with Contact Center (WWCC) defines whether to find a match based on the Order Administration customer number or the Customer Engagement ID.

Match Code: Search results include customers whose match codes start with your entry or match it exactly.

Customer Results Fields

The following information is displayed for all customers matching your search criteria.

The fields displayed are based on the **Search by Customer Information Fields** selected in Work with Contact Center (WWCC).

If the *ORCE Customer Integration (L37)* system control value is set to INTERACT, the matching customers are returned from Customer Engagement, and the message **Results from Oracle Retail Customer Engagement** is displayed above the search results if the results are from Customer Engagement.

If the *ORCE Customer Integration (L37)* system control value is set to INTERACT but the results are not from Customer Engagement because no matches were found there, the message indicates **Results from Oracle Retail Order Administration.**

An error message indicates if the results could not be displayed because too many matching records were found in Customer Engagement.

Customer Name:

- *Sold-To Customer*: Displayed in LAST, FIRST (CUSTOMER NUMBER) format, for example, SMITH, JOHN (123) where 123 is the *Customer Number*. However, when the *ORCE Customer Integration (L37)* system control value is set to INTERACT, the customer number is not displayed.
- *Customer Address*: Includes the company name, if any, plus the first street address, city, state/province, postal code, and country code.

Phone: The customer's home *Phone Number*. Optionally, click a phone number to call the customer if the **Phone** flag in Work with Contact Center (WWCC) has **Select to set as a hyperlink** selected.

Email: The customer's *Email Address*. All email addresses for the customer are displayed. Optionally, click an email address to generate an email to the customer if the **Email** flag in Work with Contact Center (WWCC) has **Select to set as a hyperlink** selected.

Enter or Verify Customer Information Fields

The following fields identify the sold-to customer for the order.

The fields displayed are based on the **Search by Customer Information Fields** selected in Work with Contact Center (WWCC).

Current information defaults for an existing customer. When you advance to this step after selecting an existing customer from your search results, the customer's information defaults here, but you can update.

Search criteria default to this step: When advance to this step after selecting the Create New Customer option after searching for a customer, the search criteria you entered at the previous step default to the fields here. For example, if you entered a last name of Jackson when searching for a customer, Jackson defaults to the *Last Name* field.

Customer Number: If the *ORCE Customer Integration (L37)* system control value is set to INTERACT and the *Use Oracle Retail Customer Engagement Customer Number on Search* flag in Work with Contact Center (WWCC) is selected, this is the Customer Engagement ID. Otherwise, it is the Order Administration customer number.

Prefix. Optional.

First Name: Optional.

Middle Initial: Optional.

Last Name: Required if a company name is not specified.

Suffix. Optional.

Company Name: Required if a last name is not specified.

Street Address 1: Required.

Street Address 2-4: Optional.

Apartment/Suite: Optional.

Country Code: Required. Defaults from the *Default Country for Customer Address (B17)* system control value.

Postal Code: A valid postal code is required to complete the order if the **Require postal code** flag is selected for the country in Work with Countries (WCTY); otherwise, optional. If the postal code is required for the country, the SCF for the postal code will be validated.

> **Note:**
>
> If the *Use Zip/City/State Defaulting? (B13)* system control value is selected, you can enter just the postal code to have the system default the associated city and state if these fields are blank.

City: Required.

State/Province Code: Required to complete entry of the order if the selected country requires a state or province.

> **Note:**
>
> When you enter a partial state or province, matching results are displayed in alphabetical order based on the full state or province name that contains your entry, rather than those that start with your entry. For example, if you enter MA for Massachusetts, Alabama is displayed first because it contains your entry.

Email Address: Optional. For an existing customer, defaults from the customer's primary email address. If you enter a new email address for an existing customer, it is added as the customer's new primary email address.

Email Opt-In: Required. For a new customer, defaults from the *Default Opt-In/Opt-Out Flag for Customer (G97)* system control value.

Phone Number: When *Require Phone Number in OE/OM (H01)* system control value is selected, at least one phone number is required. When *Require Phone Number in OE/OM (H01)* system control value is not selected, the phone number is not required. Multiple phone numbers for a customer sold-to are supported but only one phone number can be added per phone number type. See *Add, Change, or Delete the Phone Number at the Enter or Verify Customer Step* for more information.

Mail

Rent

Customer Class: Displayed in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option, or:

- Regardless of whether it is selected for display in **Work with Contact Center (WWCC)**, the customer class is required entry if:
  - You have *Maintenance of Customer Class Field* authority, and
  - The *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is selected, and
  - The *Default Customer Class in Order Entry (D63)* system control value is blank.
- Regardless of whether it is selected for display in **Work with Contact Center (WWCC)**, the customer class is displayed but not enterable if:
  - You do not have *Maintenance of Customer Class Field* authority, and
  - The *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is selected, and
  - The customer class defaults from the *Default Customer Class in Order Entry (D63)* system control value for a new customer, or the class is already populated for an existing customer.

However, you cannot advance to order entry if:

- You do not have *Maintenance of Customer Class Field* authority, and
- The *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is selected, and
- The *Default Customer Class in Order Entry (D63)* system control value is blank.

Source code: Defaults from the *Default Source Code in Contact Center Order Entry (M55)* system control value. The source code is shown followed with the description in parenthesis. This system control value must specify a valid source code. If no default value is set, a source code that is not already listed in the drop down list can be entered manually. The source code must be set to unrestricted though and selected to show in **Work with Contact Center (WWCC)** Fields to Display.

An error message indicates if you enter a different source code that is flagged as **Restricted**. If this occurs, enter a valid source code and click elsewhere on the page to re-enable the **Next** button so you can continue entering the order.

Your entry in this field is case-insensitive; an entry of `source` matches a source code defined is converted to `SOURCE`.

The offer associated with this source code ultimately controls the pricing for the items on the order. You cannot change the source code if there are any items added to the order. However, the prices associated with this offer are not displayed until you advance to the *Review Order and Verify Order Information* step; until that time, the prices displayed are from the default *Current Offer (A33)*.

Not displayed if the **Source** field is not selected for display in **Work with Contact Center (WWCC).**

Duplicate Customers Found Fields

New Customer Record: Indicates the new customer information, including:

- Last name, First name
- Company name
- Phone number and email address
- First address line
- City, state, postal code, country code

Existing Customer Record: For each existing customer with the same Match Code, indicates the same information as the New Customer Record.

Select Card Fields

This window opens automatically at the Items step if the customer is enrolled in more than one loyalty card program. You can also open it on demand after you initially select a card program by selecting the edit icon (✎) from the *Customer Summary Fields*. Displays information on the card programs that the customer is enrolled in:

- *Card Program Name*: The description of the card from Customer Engagement. From the Description passed in the retrieveCustomer response message.
- *Card Number*: The card number assigned to the customer in Customer Engagement. From *cardNumber* in the retrieveCustomer response message.
- *Award balance*: The total amount of awards eligible for use, from the getCardInquiryData response message. This is a monetary value, including a two-position decimal. The currency code is indicated.

Additional Charges

The following system control value and secured feature combination rules apply for *Additional Charges*.

- *Additional Charges Access (A24)* secured feature must be set to ALLOW.
- The sum of all manually entered negative additional charges cannot exceed the value in *Negative Additional Charge Limit (E49)* system control value if the user does not have ALLOW authority to *Override Negative Additional Charge Limit (A60)* secured feature. An error displays on the Add and *Edit Additional Charge* windows if the user has EXCLUDE authority.
- When an Additional Charge Code has a default amount, the amount is editable only when *Enter Amount for Order Additional Charge (A80)* secured feature is set to ALLOW and *Restrict Additional Charge Amount if Default Charge (F43)* system control value is set to No.
- When *Enter Amount for Order Additional Charge (A80)* secured feature is set to EXCLUDE for a user, Additional Charge Codes without a default amount are hidden. Those with an amount will display but cannot be edited.
- For Ship for Pickup order types in Order Summary, the ability to Add, Edit, and Delete is not allowed when *Payment at POS for Ship For Pickup Orders (L60)* system control value is set to Yes.

Add Items to Order Fields

See *Add Items to Order Fields for a Registry Order* for additional fields displayed related to registries for a customer.

Add Items Search Fields

Item search field: Use a single field entry to search for items based on the following information:

- *Item ID*
- *Item Description*
- Item *Keywords*

Items whose item IDs, descriptions, or keywords match your entries are displayed. See *Searching for an Item* for more information.

Item Search Results Fields

Item Image: Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no item or SKU image has been defined.

Item Information Link: Displayed if the *Use External Item Image (L55)* system control value is selected and an item information link has been defined. Indicated by an exclamation point in the item image or placeholder image.

Item Description, followed by the *Item ID* in parentheses, for example, NUMBER 2 PENCIL (PEN234).

Quantity (*Order Line Quantity Ordered*): Defaults from the *Default Order Quantity (B30)* system *control* value. You can enter an override quantity. If you enter a negative quantity for an item line and select **Add to Order**, the*Add Unverified Return Item* window opens to enter the details.

> **Note:**
>
> Negative quantities cannot be entered for the following conditions:

- It is a store pickup order (must select pickup on shipping tab then come back and add items).
- You do not have authority to *Enter Return Authorization (A28)*, *Receive Return Authorization (A29)*, and *Credit Return Authorization (A34)* secured features.
- An existing quantity for an item line CANNOT be changed from a negative to a positive, or a positive to a negative. The item must be deleted and re-added.

No quantity is displayed or enterable for a SKU'd item; see below for the fields displayed for SKU's.

Inventory Information

- If the *Use Merchandise Locator (I38)* system control value is unselected, or if the *Use Merchandise Locator (I38)* system control value is selected but the item is not eligible for merchandise locator, you advance to the *Inventory Information* window.
- If the *Use Merchandise Locator (I38)* system control value is selected and the item is eligible for merchandise locator, you advance to the *Inventory Information (Merchandise Locator)* window.

> **Note:**
>
> - For set items, the **Check Item Availability** option is available for the set component item and not the main set item.

Default Price: From the *Current Offer (A33)* system control value. Blank if no price is defined for the item in the that offer. Set to 0.00 for a warranty item.

> **Note:**
>
> The price changes at the *Review Order and Verify Order Information* step if the price specified for the offer associated with the source code from the *Enter or Verify Customer Information* step is different from the price defined for the default *Current Offer (A33)* system control value.

SKU Search Results Fields

The total number of SKU variations is indicated before the SKU search results.

SKU image (see *Item Image*): Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no SKU image has been defined.

SKU information link (see *Item Information Link*). Displayed if *Use External Item Image (L55)* is selected and an external SKU information link is defined. Indicated by an exclamation point in the SKU image or image placeholder.

SKU Description

Variations (*SKU*)

See the discussion of the *Split SKU Values (B32)* system control values in the Classic View online help for a discussion on how SKU elements are displayed.

Quantity (*Order Line Quantity Ordered*): Defaults from the *Default Order Quantity (B30)* system *control* value. You can enter an override quantity. If you enter a negative quantity for an item line and select **Add to Order**, the*Add Unverified Return Item* window opens to enter the details.

> **Note:**
>
> Negative quantities cannot be entered for the following conditions:

- It is a store pickup order (must select pickup on shipping tab then come back and add items).
- You do not have authority to *Enter Return Authorization (A28)*, *Receive Return Authorization (A29)*, and *Credit Return Authorization (A34)* secured features.
- An existing quantity for an item line CANNOT be changed from a negative to a positive, or a positive to a negative. The item must be deleted and re-added.

Default Price: Maybe be different for the default price for the base item or for other SKU's. From the *Current Offer (A33)* system control value. Blank if no price is defined for the item in the that offer. Set to 0.00 for a warranty item.

> **Note:**
>
> The price changes at the *Review Order and Verify Order Information* step if the price specified for the offer associated with the source code entered at the *Enter or Verify Customer Information* step is different from the price from the default *Current Offer (A33)* system control value.

Add Items to Order Fields for a Registry Order

The **Customer's Registries** option on the upper right enables you to display all of the customer's registries. The **Customer's Registries** button will always show if the configuration is set, even if there is no data to display.
Registry header information: The following information about the selected registry is displayed below the Add items to order title for a registry order:

- Registry name: The Name defined for the registry in Customer Engagement.
- Customer name: The name of the primary registry owner defined in Customer Engagement, in Last name, First name order.
- Registry type: The type of registry defined in Customer Engagement. Possible types are Gift Registry and Wish List.
- Event type: The event type defined for a registry in Customer Engagement, such as Birthday Party or Wedding Shower. Not displayed for a Wish List.

- Venue: The name of the venue, if any, specified in Customer Engagement for the registry. Not displayed for a Wish List.
- Date: The Event Date defined in for the registry in Customer Engagement. Not displayed for a Wish List.

Registry items:

- Number of items found: Indicates the number of items included in the registry. This total may include store-only items, which are not available to add to an order in Order Administration.
- Item information: Includes the item description for the item in Order Administration, followed by the item number or code, in parentheses. The *ORCE Integration ID (L38)* system control value defines how to map the item or SKU from Customer Engagement to Order Administration.

  The *Item Image* and *Item Information Link* are also displayed, if they have been defined for the item.

  Store-only item: If there is no record of the item in Order Administration, the description is Store only item. You cannot add a store-only item to an order.

  SKU'd item? Note that each SKU of an item in the registry is listed separately, unlike the display of SKU'd items in the regular Item Search Results Fields.

  If an item on the registry is assigned the status defined in the *Item Status for Suppressing Item During Item Selection (L21)* system control value, the item is not displayed in Contact Center Order Entry during registry order creation.
- Quantity desired: The requested quantity of the item defined for the registry in Customer Engagement.
- Quantity purchased: The quantity of the item that has already been purchased, either through Order Administration or another system integrating with Customer Engagement. The quantity displayed does not increase when you add the item to the current order; it increases after you submit the order.
- Quantity to order: Optionally, enter the quantity of the item to add to the order. Defaults from the *Default Order Quantity (B30)* system control value. You can enter an override quantity. Your entry can exceed the Quantity desired, regardless of the current Quantity purchased.
- Default price: The price as defined in Order Administration.

Add Unverified Return Item Fields

If you enter a negative quantity for an item line and select **Add to Order**, this window opens to enter the details of the return or exchange. The fields on the **Add Unverified Return Item** page are listed below.

- *Item ID*: Displays the base Item ID associated to the item selected for the unverified return. Display-only.
- *Item Description*. Display-only.
- *SKU Description*: Included only if the item has SKU's. Display-only.
- Quantity:
  Indicates the number of units to return is in a negative. The field allows you to enter or scroll through the valid numbers between -1 to -99,999. The quantity is defaulted to the Quantity entered on the Item/SKU page when Add to Order was selected.

- Price Override: Allows you to enter a value price override value. The unit price amount for the item is displayed below.
- *No Charge*: Optionally, select this option to return or exchange the item at zero charge. If selected, the Price Override field is display-only.
- Override Reason: Required if Price Override has a value or No Charge is set to Yes. The drop-down list of all price override reasons from WPOR is shown.
- Return With Exchange: Optionally, select this option to process an exchange for the returned unit(s). The message “"A replacement item must be added through the Items step.” is displayed. The Exchange Reason field with a drop-down list of *Exchange Reasons* is shown. If this option is unselected, a Return Reason field with drop-down list of *Return Reasons* is shown instead.
- *Return Reason*. Required, unless the *Return With Exchange* flag is selected. Alphabetically, lists all Return Reason Descriptions from WRTR.
- *Exchange Reason*: Required when the *Return With Exchange* flag is selected. Alphabetically, lists all Exchange Reason Descriptions from WEXR.
- *Return Disposition*. Required. Defaults from the *Default Disposition Code (C18)* system control value. Alphabetically, list all Return Disposition Descriptions from WRDV where the user has user or user class authority

  A warning or error message can occur when **Add to Order** is clicked from the *Add Unverified Return Item* or *Edit Unverified Return Items* windows.

  The Return Disposition Code must be set to Affect Inventory = Yes and the following conditions apply:

Primary Location (MITM)	Selected 'primary' location	System Control Value Setting	Message Displayed
The primary location is different from the Items primary location (MITM)	AND the selected 'primary' location does not exist already for this item warehouse	*Allow Multiple Primary Locations (D12)* is set to CONFIRM	Warning Message: "Do you want to create multiple primary locations for this item?" Select **Cancel** to close the message or select **Confirm** to create the new primary item warehouse location record when it submits the unverified return. The system will create the item warehouse location record but will not add it as the primary warehouse/location in MITM.
The primary location is different from the Items primary location (MITM)	AND the selected 'primary' location does not exist already for this item warehouse	*Allow Multiple Primary Locations (D12)* is set to NOT ALLOW	Error Message: "Multiple primary locations are not allowed." Select another location in order to **Add to Order** or confirm the Edit.

Item does not have a primary location (MITM) or the item is a Drop Ship item	*Display No Primary Location Message in Returns (G46)* is set to Y	Warning Message: "A primary location for the item does not exist." Select **Cancel** to close the message or select **Confirm** to create the new primary item warehouse location record when it submits the unverified return. The system will create the item warehouse location record but will not add it as the primary warehouse/location in MITM.
Item does not have a primary location (MITM) or the item is a Drop Ship item	*Display No Primary Location Message in Returns (G46)* is set to N	No warning. The system will create the item warehouse location record but will not add it as the primary warehouse/ location in MITM.

- *Warehouse*. The warehouse where the returned item will be received. This value is used only if the disposition code affects inventory. If there is only a single existing Item Warehouse record for the item, you cannot select a different warehouse. If *Use Primary Location* is set to Yes, the warehouse defaults to the SKU records primary warehouse otherwise, if a warehouse is defined for the return disposition code, this warehouse defaults. May be required based on the return disposition. Alphabetically, list all Warehouses from WWHS.
- *Warehouse Location*. The physical location within the warehouse where the returned item will be received. This value is used only if the disposition code affects inventory. If there is only a single existing Item Location record for the item, you cannot select a different location; however, if the return disposition defines a default return location and warehouse, such as returns location in a virtual returns warehouse, this warehouse and location default. If *Use Primary Location* is set to Yes, the warehouse location defaults to the SKU records primary location. May be required based on the return disposition. Alphabetically, lists all Locations from WLOC associated to the selected warehouse.
- *Refund Duty Charges*. Optional. Indicates if duty should be refunded for the item.

Personalization Fields

Custom Personalization Fields

The following fields display based on the personalization selected in the **Personalization** field. A custom label displays for each option that can be performed on the item, and optionally, the associated charge to apply the option to the item.

- **Label** *Personalization (Special Handling) Custom Label*: the name of the label is defined in the Special Handling Format table; you can create and work with custom special handling formats using the **Work with Special Handling Formats (WSHF)** menu option. An asterisk (*) displays to the left of the label if a response is required.
- **Input** *Personalization (Special Handling) Custom Response*. If the *Display Special Format Response Descriptions (E90)* system control value is selected, the response description displays rather than the response itself.
- **Charge** *Personalization (Special Handling) Custom Charge*: This field displays only if a **Default Price** or **Default Price %** is defined for the special format detail, the **Feature/ option** field for the special format detail is selected, and a **Special Handling Price** is not defined for the item offer or SKU offer. Display-only.

For more information: See *Personalize* for an overview of this window in Contact Center order entry.

Standard Personalization Fields

The following fields display when standard personalization has been defined for an item, supporting the entry of free-form text.

- **Personalization Charge** *Personalization (Special Handling) Charge*. Display-only.
- **Instructions** *Personalization (Special Handling) Instructions*. Optional entry.

For more information: See *Personalize* for an overview of the **Add Personalization** window in Contact Center order entry.

Coordinate items? See Fields on Select Coordinate Items for a description of the fields on the *Select Coordinate Items* window.

Order Settings Window

Within order entry, Order Settings can be accessed from *Customer Information*, *Items*, *Shipping* and *Review* steps. It is located next to the cart icon in the upper right and allows additional data to be set at the order detail level. The window shows the following information:

User Hold Reason. This field has been moved from the Messages window. See *Order Holds* for more information.

Order Date. The date must fall within an active accounting period defined in Work with Accounting Periods (WACP). The system will set the date automatically if not populated.

Origin.

- Defaults from *Default Order Type (B28)* system control value
- Excludes the order types from the list where:
  - Quote is set to Y
  - is in Order Type for *Orders Brokered for Delivery (K91)* system control value
  - is in Order Type for *Retail Pickup Orders Brokered to OROMS (K92)* system control value
  - is in Order Type for *Orders Brokered for Store Pickup (L33)* system control value
  - is in Order Type for *Delivery Orders Originating in OROMS (M33)* system control value
  - is in Order Type for *Retail Pickup Orders Originated in OROMS (M35)* system control value
  - is in Order Type for *ChannelAdvisor (L90)* system control value
- cannot be changed if the order is a Pickup order

Sales Representative.

- Defaults from Customer Sold To if populated, otherwise from *Default Salesrep # (E86)* system control value if active in **Work with Salesrep (WSLS)**, otherwise empty

- Required if *Require Salesrep # In Order Entry/Order Maintenance (E87)* system control value is set to Yes
- Sales representatives listed must be active in **Work with Salesrep (WSLS)**
- Only displayed if 'Sales Representative' (previously Sales Rep Number) is set to show in **Work with Contact Center (WWCC)** Fields to Display

Sales Representative Store.

- Defaults from Home Store assigned to Store Representative, if active in **Work with Store Cross Reference (WSRC)**, otherwise empty.
- Only displayed if 'Sales Representative Store' is set to show in **Work with Contact Center (WWCC)** Fields to Display

Messages Fields (Order-Level or Item-Level)

The Messages icon is found in the Shipping tab within the Ship-To Details view for a specific ship-to.

Select **Messages** to open the Messages window that contains the:

- *Message Type*: Possible types:
  - Order Note in the Order Notes section.
  - Gift or Pick Slip in the Messages section.

  Within the Messages window, Order Notes apply to the entire order and show regardless of which ship-to you are on when opening the window and Messages apply to the specific Ship-To currently selected. All order notes stay with the order and are not removed when a ship-to is deleted.
- *Message*: The contents of the order note, gift message, or pick slip message.

Order-Level Message Entry Fields

You can use the following fields to enter an order note or message.

Order Notes:

- Message Template (*Order Message Template*). Available only if one or more templates are defined in Work with Default Messages (WMSG) in Classic View with a **Message Type** of **Order Message** and a **Print Code** of **Nowhere.**
- New Message (*Order Message*). Defaults to the same text as the Message Template, if selected, but you can override it.

Place order on hold: *User Hold Reason*

Messages:

- *Message Type*: Either Gift or Pick Slip.
- Message Template (*Order Message Template*). Available only if one or more templates are defined in Work with Default Messages (WMSG) in Classic View whose type matches the selected **Message Type** of Gift or Pick Slip**.**
- New Message (*Order Message*). Defaults to the same text as the Message Template, if selected, but you can override it.

Order-Level Message Display Fields

The following fields are displayed for existing order notes or messages.

- *Message Type*: Set to Order Note for an order note; set to Gift or Pick Slip for an order message.
- Message (*Order Message*). The entered order message.

Item-Level Message Entry Fields

Status Messages (*Item/SKU Status Message*): If there are both item-level and SKU-level status messages, the SKU-level messages are displayed.

Comments (*Item/SKU Comment*)

Order Line Messages:

- Message Template (*Order Line Message Template*). Available only if one or more order line message templates have been defined in Classic View (WMSG).
- Message (*Order Line Message*)
- Print (*Order Line Message Print Location*)
- Actions: Select **X** to delete.

Edit Item Window Fields

The **Edit Item** Window can be opened from the *Edit* link in the **Order Summary** panel or from the item section of the *Review* tab.

Item Image: Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no item or SKU image has been defined. Display-only.

Item Information Link: Displayed if an item information link has been defined and the *Use External Item Image (L55)* system control value is selected.

Item Description. The description of the item. The *Item ID* follows in parentheses.

Quantity (*Order Line Quantity Ordered*). Required. Cannot be zero or negative. See the discussion under *Add Items to the Order* for limits on the order line quantity and order line value.

Unit Price (*Order Line Price*). Required unless the item is *No Charge*. Display-only if you do not have authority under the *Price Overrides* secured feature, or if this is a warranty item.

> **Note:**
>
> The price is initially from the default *Current Offer (A33)*, and changes at the *Review Order and Verify Order Information* step if the price specified for the offer associated with the source code entered at the *Enter or Verify Customer Information* step is different from the price from the default *Current Offer (A33)*.

No Charge. Display-only for a warranty item.

Override Reason (*Price Override Reason*). Required when changing the price or setting the item to No Charge. Display-only for a warranty item.

Offer. Defaults to the offer assigned to the Source Code on the Order Header (Customer tab). Display a list of Offers defined in WOFR with Offer Description followed by Offer Code. Offers listed must have the current date with the offer date range and where its currently matches the offer currency assigned to the Order Header Source Code when *Multi Currency by Offer (E03)* is set to Yes. Only displayed if 'Offer Code' is set to selected in **Work with Contact Center (WWCC)** Fields to Display.

Source Code. Source codes listed must have Viewable in O/E set to Yes and Restricted set to No in Work with Source Codes (WSRC). Displayed in the format of Source Code followed by Source Description. Only displayed if 'Source Code' is set to selected in **Work with Contact Center (WWCC)** Fields to Display. If not overridden, the system will use existing logic to identify if a different source code will be assigned to the line, otherwise it will use the source code from the order header.

Ship Via: Blank if the ship via on the order header applies. If you override the ship via, your selection must be a valid ship via for the item.

Delayed Arrival. This date is set to default to *Date from Default Future Orders Arrival Date (E53)* system control value when *Future Orders Item Status (E52)* and *Date from Default Future Orders Arrival Date (E53)* are populated AND the item status matches *Future Orders Item Status (E52)* otherwise default empty. The Delayed Arrival date cannot be earlier than the current date or the order date. Only displayed if 'Arrival Date' is set to selected in **Work with Contact Center (WWCC)** Fields to Display.

Shipping Override Amount. Default is set to 0. Editable only if the source code associated to the order header has a Freight Method of By Item, otherwise input is disabled but still visible. It does not look at the source code on the item detail line.

Override Ship-To Cancel Date. The cancel date at the line level can optionally be overridden to a different value from the ship-to by selecting an override switch. If the override switch is set to No, the cancel date displays the value from the shipping level and cannot be changed. If the override switch is set to Yes, the cancel date field can be changed. The Cancel Date cannot be earlier than the current date, order date or the delayed arrival date. Only displayed if 'Arrival Date' is set to selected in **Work with Contact Center (WWCC)** Fields to Display. If the Cancel Date is changed on the Shipping tab, the system updates all existing lines assigned to that ship-to where the cancel date override is set to No.

Override Ship-To Backorder Priority. Override switch is set to No by default, with the default priority set from the Shipping tab and cannot be changed, otherwise the default is empty. If the override switch is set to Yes, the backorder priority field can be changed. The priority indicates the sequence in which orders with backordered items reserve first, where 0=Lowest priority and 9=Highest priority. Only displayed if 'Backorder Priority' is set to selected in **Work with Contact Center (WWCC)** Fields to Display. If Backorder Priority is changed on the Shipping tab, the system updates all existing lines assigned to that ship-to where the backorder priority override is set to No. If the *Auto Update Order Priority (G45)* system control value is set to Yes, when the Review/Refresh step processes the order, the system will automatically set the Backorder Priority to 9 when:

- The Delayed Arrival date on the ship-to is greater than the current date, or
- The Delayed Arrival date on the ship-to is not greater than the current date, but the Delayed Arrival date on the line is greater than the current date.

> **Note:**
>
> When the Backorder Priority is automatically updated to a 9, this will not be reflected in Order Entry but will be through Order Summary screens.

Override Customer Class *Bypass Reservation*. Indicates whether reservation should be bypassed for the item/sku and overrides the value defaulted. The default is based on the Bypass Reservation setting on the Customer Sold To and Customer Class when the customer is initially loaded. If selected (Y), prevents the line from being reserved. Unselected (N), allows the line to be reserved. The bypass reservation at the line level can optionally be overridden to a different value from the default from the Customer Class by selecting an override switch. If the override switch is set to No, the bypass reservation displays the default value and cannot be changed. If the override switch is set to Yes, the bypass reservation field can be changed. If Customer Class is changed on the Customer tab, the system updates all existing lines assigned where the bypass reservation override is set to No.

Affect Inventory. Default is set to Y except for the following conditions.

- If any of the following flags are set to Y on the SKU record, set Affect Inventory to N and it cannot be changed:
  - Non Inventory = Y
  - Subscription = Y
  - Membership = Y
  - SVC Type = 'V' (Virtual)
  - Kit Type = 'S' (Set)
- If the item is a Drop Ship, set Affect Inventory to Yes and it cannot be changed.
- If the ship via on the order header or specific line is Express Bill type, set Affect inventory to No and it cannot be changed.

Indicates whether inventory should be increased/decreased for the item/sku. Selected (Y) , reduces inventory during reservation. Unselected (N) means do not affect inventory. Only displayed if 'Affect Inventory' is set to selected in **Work with Contact Center (WWCC)** Fields to Display.

Override Ship-To Warehouse. Defaults to the Warehouse from the Shipping tab, otherwise defaults to empty. Displays a list of Warehouses defined in WWHS with the Warehouse description followed by the code. The warehouse at the line level can optionally be overridden to a different value from the ship-to by selecting an override switch. If the override switch is set to No, the warehouse displays the value from the shipping level and cannot be changed. If the override switch is set to Yes, the warehouse field can be changed. Only displayed if 'Warehouse' is set to selected in **Work with Contact Center (WWCC)** Fields to Display. If the Warehouse is changed on the Shipping tab, the system updates all existing lines assigned to that ship-to where the warehouse override is set to No.

> **Note:**
>
> When overrides are entered on the Ship - To, the override is not reflected at the item level on the Ship - To unless you click **Next** or **Previous**.

Gift Wrap. Available only if gift wrap is enabled for the item offer associated with the source code on the order header, or for the SKU offer if the item has SKU's. Also, displayed in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Gift Wrap Charge: Displayed only if the *Gift Wrap* option is displayed.

Order Summary Panel Fields

Customer Summary Fields

Displayed when? Customer information is displayed after you select or create a customer for the order.

Customer Name: The customer's first and last name.

Customer Number: Displayed only for an existing customer. Not displayed for a new customer creating for this order. In parentheses to the right of the customer name.

Company Name: Displayed in addition to the Customer Name, if both are specified.

Optionally, click the customer summary fields to open the *Customer Order List* in a new tab, or to move to that tab if it is already open.

Loyalty fields: Displayed only if the customer is enrolled in one or more loyalty programs.

- Loyalty Member: The Loyalty Member icon and label (Loyalty Member), indicating that the customer is currently enrolled in one or more loyalty programs. An edit icon () is displayed if the customer belongs to more than one loyalty program. Optionally, you can click the edit icon to reopen the Select Card window and select a card to use for applying an award amount to the order, or to change the selected card.
- Award Balance: The total value of awards that are available to apply to the order through all awards programs for the customer's loyalty card, or for the card selected at the *Select Card Window* if the customer has more than one loyalty card. This total includes the award amount, if any, that you have already selected to apply to the current order. The currency on the order is indicated.

Entitlement Coupons Fields

Displayed when? This window opens after selecting **Entitlement Coupons available** link or the **Edit** icon in the Order Summary panel and shows the following fields:

Prior to the first Review step (order not submitted),"Coupons will be evaluated during order review" is displayed. After the Review step (order has been submitted), "Coupons will be evaluated when you press Refresh Order." is displayed.

Check box: Indicates if the coupon should be applied as a qualifier to ORPE.

Deal Name: <Name> tag value from the <EntitlementDeal> element from ORCE.

Coupon Expiry Date: <ExpiryDate> tag value from the <EntitlementCoupon> element from ORCE.. If expiry date is not available 'No expiration' is displayed.

Applied Message: Once the order is submitted, if the coupon was selected, it displays a different message if it was applied by ORPE to the order:

- If applied, display: <green checkbox icon> 'Coupon applied'
- If not applied, display: <red slash icon> 'Coupon was not applied'

Coupons Fields

Displayed when? *Coupons* section is displayed in the Order Summary panel when system control value *Use ORPE Promotion Engine (M77)* and a *Allow Manual Entry of Promotion Code (I63)* are both enabled.

Add Coupon Code Window: Only displayed when using a source code with price method *Reg Plus Reprice* and when system control value *ORCE Organization Descriptor (L50)* is set to ws, and a *Default Location for ORCE Integration (K69)* set. If the source code used at order entry has price method other than *Reg Plus Reprice*, a warning message is displayed within the **Coupons** section advising *Source code does not support Coupons*.

When the **Add Coupon Code** button is selected, a window opens so that you can enter coupon codes. Entered coupons are evaluated during *Review Order and Verify Order Information* step, rather than immediately upon closing the window, since additional order changes may be incorporated.

After adding a coupon code, the Coupons section is updated with the coupon codes count and an Edit (✎) link can be used to change or delete the coupon codes as necessary.

If using multiple ship-to functionality: Each coupon code (Regular Coupons, Serialized Coupons, Targeted Exclusive Promotions and Entitlement Coupons) entered is passed with each ship-to on the order and sent to ORPE applyDeals service per ship-to. The ORPE applyDeals service determines whether that specific ship-to qualifies for the promotion and if so, applies the coupon to the order.

- If the coupon is applied to at least 1 ship-to, the coupon is considered to be successfully applied.
- If the coupon did not apply to any ship-to, a message shows that it was not applied.

ORCE Serialized Coupons and Entitlements Coupons are redeemed once per unique coupon code even when there are multiple ship-to's on the order where the coupon was applied. The qualification is at a ship-to total, not at an order level. However, one time use coupons apply to all ship-to's on the order since it is passed with each one.

At the Review step, or after Refresh Order if changes were added, the **Coupons** section may display a message indicating that Codes were not applied; this occurs if any serialized coupons were previously redeemed or coupons were submitted for evaluation but were not applied.

Add Coupon Code Window Fields

Coupon Code: The code that identifies the coupon applied to the order or order detail line. To add a coupon, enter the code here. More than one code can be entered. No validation is done for validity on the coupon codes value entered (this will occur during Review/Submit).

Order Total Fields

Displayed when? Includes only the current *Merchandise* total after you select or create a customer and until you advance to the *Review Order and Verify Order Information*. This amount is 0.0 until you add at least one item to the order. This total is based on the items and quantities added to the order so far, and item prices are initially based on the default *Current Offer (A33)*. The merchandise total is updated when you advance to the *Review Order and Verify Order Information* step, including using the prices from the source code specified at the removing the extended price of any soldout items and applying any discounts.

The currency for the order is shown beneath the order total amount based on the source code entered on the customer information tab. This currency displayed is based on the following hierarchy:

1. If *Multi Currency by Offer (E03)* system control value is Yes, the currency shown is from the offer associated to the source code on the order.
2. If *Multi Currency by Offer (E03)* system control value is No, the currency shown is from the *Local Currency Code (A55)* system control value setting.

The following additional **Order Total** fields are displayed at the *Review Order and Verify Order Information* step:

Shipping: An information icon (ⓘ) indicates that there has been a discount to the shipping charges, including:

- The shipping charges have been discounted, possibly through:
  - A freight promotion applied to the order automatically, or entered in the *Promotion Code* field at the *Select Shipping Option and Enter Other Order Information* step, or
  - Entry of a *Shipping Override* at the *Select Shipping Option and Enter Other Order Information* step.

    The message indicates `Shipping override applied`, or `Shipping discount applied` if the discount was applied through a freight discount promotion. If the promotion applied free freight, the message is `Free shipping applied`. **Note:** Depending on your screen resolution, the information may appear next to the *Additional Shipping* total.

Additional Shipping

Additional Charges: An information icon (ⓘ) indicates that there has been a discount applied to the order using an additional charge code, such as a promotion applied automatically or entered in the *Promotion Code* field at the *Select Shipping Option and Enter Other Order Information* step. In this case, the message indicates `Discount applied`. In this case, the additional charges total is a negative number, unless greater positive additional charges have been added.

Personalization (*Personalization (Special Handling) Custom Charge*). Any personalization charges on the order.

Tax

Order Discount: Displayed at the *Review Order and Verify Order Information* step, as illustrated below, if the *Display Discount on Order Recap Screen (D38)* system control value is selected. For example, the merchandise total can be discounted through a promotion, or through entry of a *Discount Percent* at the *Select Shipping Option and Enter Other Order Information* step.

2.41 Order Discount

The Currency Code is displayed below the Total value. If the *Multi Currency by Offer (E03)* system control value is selected, the currency code is from the offer associated to the source code on the order. If the *Multi Currency by Offer (E03)* system control value is not selected, the currency code is based on the *Local Currency Code (A55)* system control value setting.

Shipping Fields

The following shipping fields are displayed once you advance to the *Add Payment* step:

Shipping name and address: See *Ship To Fields*

Ship Via code and description

Pickup Location Fields

Displayed only for a pickup or ship-for-pickup order, and only at the *Add Payment Fields* step.

Store Name

Store Address

Indication if the order is **Ship for Pickup** or available for **Store Pickup**.

Ship-To Fields

Displayed when? After you start adding items at the *Add Items to the Order* step, displays each item on the order in reverse chronological order (newest to oldest). Does not include any set components or free gifts until they are displayed at the *Review Order and Verify Order Information* step.

Each ship-to has its own section that can be expanded/collapsed (default) to show the shipping address details (name, address, telephone numbers, email address) ship via, and ship-to totals (depending on the tab — see table below for more information). Each time you move forward in the tabs or switch between the ship-to's, the ship-to section is collapsed.

The items for each ship-to are always visible regardless of if the ship-to section is expanded or collapsed.

The same attributes that are available at the Order Total section are shown for each ship-to except with the amounts for the specific ship-to. These include:

- Merchandise (info icon if discounts exist)
- Shipping
- Additional Shipping
- Additional Charges
- Personalization
- Tax
- Total with the Currency Code such as USD, displayed below the total
- Discount information

The data in the Ship-To section on the Order Summary panel is not always displayed and is based on the Order Entry tab you are on. The following table indicates which ship-to information is displayed on the Order Entry tabs. For example, Totals will only show on the Review and Payment tabs.

Tab Name	Which Ship-To Data is Displayed
Items and Shipping	• Prior to the Review step and after at least one item is on the order (even if deleted after), the Ship-To Title with Name and Address is displayed. Ship Via is not displayed. • After the Review step, Ship-To Title with Name, Address and Ship Via is displayed. • Totals do not display.

Review and Payment	• Display Ship-To Title with Name, Address, Ship Via and Totals.

Registry name: Displayed if the item was added as part of a registry order. Optionally, at the Add items to order step, you can click the registry name to display the list of items in the registry, as described under *Selecting Items and Adding them to a Registry Order* and Add Items to Order Fields for a Registry Order. At other steps in order entry, the registry name is display-only.
Item Image: Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no item or SKU image has been defined.

Item Information Link: Displayed if the *Use External Item Image (L55)* system control value is selected and an item information link has been defined. Indicated by an exclamation point in the item image.

Item Description and *Item ID*. These provide a link to item information, if defined; otherwise, display-only.

The messages icon () to the right of an item enables you to enter or work with order line messages. See the *Messages Window (Items)* for more information.

Unit Price (*Order Line Price*): Each item added to the order is displayed initially with the regular offer price based on the *Current Offer (A33)* system control value before applying any discounts, including quantity break prices, with repricing applied at the *Review Order and Verify Order Information* step to use the pricing from the offer specified at the *Enter or Verify Customer Information* step. Also, soldout items are displayed initially with their regular offer prices until you submit the order.

Quantity (*Order Line Quantity Ordered*)

The *Delete* and *Edit* options are displayed beneath each item. Also, the *Personalize* option is displayed until you get to the *Review Order and Verify Order Information* step if the item is eligible for personalization.

Select Shipping Option and Enter Other Details Fields

If store pickup is enabled, a toggle switch displays Delivery and Pickup. If store pickup is not enabled, the toggle switch is not shown and the default layout is that for Delivery. Each Ship-To information is displayed within its own block known as the **Ship-To Address Panel**. When there is more than one ship-to address, the ship-to highlighted with a blue border and a checkmark indicates the specific ship-to in focus and all actions and details shown apply to that ship-to. The ship-to number is sequential starting with 1 for each ship-to. The **Ship-To Details** and **Ship-To Items** toggle switch displays on the right. These toggle options are not shown if it is only a single ship-to on the order. See *Multiple Ship-To Address* for more information.

Ship-To Address Panel

A badge displays next to the Ship-To name identifying the type of Ship-To. It indicates whether the ship-to address originates from the primary address, from the address book entry or a one-time ship-to address. If a different ship-to address is required other than that shown, click **Edit** to open the *Edit Ship-To* drawer. See *Enter a Different Shipping Address* for more information. If more than one ship-to address is required, these additional addresses are entered via the **Add Ship-To** process. The **Delete** button, to *delete the ship-to address*, only displays if there is more than one ship-to present.

Add/Edit Ship-To Drawer

This drawer shows **Add Ship-To** when clicked from **+ Add Ship-To** from the *Shipping (Order Entry Step 4)* page.

The drawer displays **Edit Ship-To** when clicked from **Edit** for a specific Ship-To name and address component from the *Shipping (Order Entry Step 4)* page.

The **Add/Edit Ship-To** drawer displays three options to change the shipping address for the order:

- Primary Address - same as customer address. The address can be updated if necessary. See *Enter or Verify Customer Information Fields* for a description of the fields,
- *Address Book* - a customer address book allows addresses to be selected, added, edited, or deleted so the order may be shipped to a different address and or person other than the primary address.
- *One-Time Address* - orders can be shipped to a one-off recipient.

Address Book Fields

Prefix. Optional.

First Name: Optional.

Middle Initial: Optional.

Last Name: Required if a company name is not specified.

Suffix. Optional.

Company Name: Required if a last name is not specified.

Street Address 1: Required.

Street Address 2-4: Optional.

Apartment/Suite: Optional.

Country Code: Required. Defaults from the *Default Country for Customer Address (B17)* system control value. Position to the correct country by typing the country name rather than the code.

Postal Code: A valid postal code is required to complete the order if the **Require postal code** flag is selected for the country in Work with Countries (WCTY); otherwise, optional. If the postal code is required for the country, the SCF for the postal code will be validated.

City: Required. No default.

State/Province Code: Required to complete entry of the order if the selected country requires a state or province. No default.

Email Address: Optional.

Phone Number: When the Customer Sold-To's primary address is also the Ship-To address and for all *Address Book* Ship-To’s, all assigned phone numbers (home, business, and mobile/fax) for that Ship-To are shown, displayed with the corresponding phone type in parenthesis following the phone number. For each one-time ship-to order, a single assigned phone number is shown on the Shipping stop. The one-time ship-to phone number is not formatted until after you accept the order.

Customer Address Fields for Pickup Location Search

Use the following fields to search for pickup locations within a specified distance.

The postal code, street address, city, country, and state/province all default from the customer's address.

Postal Code: Required if street, city, and state are not specified.

Street Address: Required if no postal code is specified.

City: Required if no postal code is specified.

Country Code: Required.

State/Province Code: Required if no postal code is specified.

Search Within (*Search Radius*): *Defaults from the Default Search Within Radius (I40)* system control value, while the setting of the *Merchandise Locator Distance Measurement (I39)* system control value defines the displayed unit of measure: miles or kilometers. Required.

Eligible Pickup Location Fields

The following information is displayed for each location where the order can be picked up.

Store Name

Store Address

Distance from the customer's address.

A message indicating either:

- All items available to be shipped to store for pickup, or
- All items available in store for pickup

See *Broker Delivery Type* for a discussion of the different delivery types.

Ship-To Details Fields

How to display: On Ship-To Details view on the *Shipping (Order Entry Step 4)* page when multiple ship-to addresses are present.

Additional Charges

Messages

Attention

Delayed Arrival: Optional. If entered, must be a future date.

Gift Order: When you select this flag, the *Messages Window* opens so that you can enter a gift message.

Ship Via

If you specify an express-bill *Ship Via* for the order, authorization for a credit or debit card is required before you can accept the order. If on-line authorization is not enabled, you need to authorize the card manually.

Shipping Override Amount. If the Order Header Source code is set to line level freight method, the entry into the Shipping Override Amount field on the shipping tab is disabled.

Shipping Override Amount, where you can enter an override for this freight method, has been added to the *Edit Items* window.

Calculate Shipping (*Calculate Shipping (Freight)*)

Ship Complete

Cancel Date. Default empty. The date when the order will be canceled if all lines have not shipped. The Cancel Date cannot be earlier than the current date, ship-to delayed arrival date or order date.

Cancel Backorder. Defaults from the *Auto Cancel B/O* from the customer sold to for each shipping address added. Indicates whether the system will cancel any backordered items automatically for the first shipment on the order (during Confirmation, in which items are confirmed for shipment). Selected =Items cannot be backordered, Unselected =Items can be backordered.

Backorder Priority. Defaults the priority entered in the B/O priority field on the customer loyalty membership record. This is based on the customer sold to and if it has a valid customer loyalty membership. Determines the sequence in which orders with backordered items reserve first, where 0 =Lowest priority and 9 =Highest priority. If the *Auto Update Order Priority (G45)* system control value is set to Yes, when the Review/Refresh step processes the order, the system will automatically set the Backorder Priority to 9 when the Delayed Arrival date on the ship-to is greater than the current date.

> **Note:**
>
> When the Backorder Priority is automatically updated to a 9, this will not be reflected in Order Entry but will be through Order Summary screens.

Warehouse. If the *Reserve from Non-Allocatable Warehouse (J25)* system control value is selected, default the warehouse defined for the order type. The *Reserve from Non-Allocatable Warehouse (J25)* system control value is unselected, leave empty. The warehouse used to ship the order. Displays a list of Warehouses defined in **Creating and Maintaining Warehouses (WWHS)** where the warehouse description is followed by the warehouse code.

Additional Order Details Fields

Optionally, enter any of the following fields.

Tax Code: Required if a **Tax Identification** number is entered or defaults.

Tax Identification: Required if the **Tax Code** is set to **Resale** or **Exempt**.

> **Note:**
>
> If the customer's tax code and tax ID have defaulted and you clear them both in order entry, the order is created as taxable; however, this does not clear the tax code and tax ID for the customer.
>
> If the tax code is set to Exempt or Resale and the tax identification number has expired, you will not be able to accept the order unless you either clear the Tax Code or enter a new Tax Identification number.

Promotion Code: Available only if the *Allow Manual Entry of Promotion (I63)* system control value is selected. This field is hidden when integration to *Use ORPE Promotion Engine (M77)* system control value is selected.

To add promotions to the order, type the promotion code to apply and press **Enter**. Repeat for each promotion to add to the order. You cannot prompt on this field.

Promotions are validated at the *Review Order and Verify Order Information* step. If:

- A promotion code is valid and the order qualifies for the promotion, the promotion discount or benefit is applied to the order. In the case of automatically adding a free item for a BOGO promotion, the item is added at the *Review Order and Verify Order Information* step.
- A promotion code is valid but the order does not qualify for the promotion, the promotion is not applied.
- A promotion is not currently active, no error is displayed. The promotion is not applied to the order, and an order transaction history message indicates that the promotion was not applied.
- A promotion code is invalid, you need to correct or remove the promotion at the *Review Order and Verify Order Information* step.

For more information: See **Working with Promotions (WPRO)** in the help user guide.

Discount Percent: Optionally, enter a discount percentage to apply to the order. Available only if it is selected for display in the **Work with Contact Center (WWCC)** menu option. This field is hidden when integration to *Use ORPE Promotion Engine (M77)* system control value is selected. However, the loyalty membership discount (WWCM) still applies if applicable.

Purchase Order Number. The customer's own purchase order number. Only appears if 'Purchase Order Number' is set to selected in **Work with Contact Center (WWCC)** Fields to Display.

Verify Order Information Fields (Review Step)

Loyalty Awards Fields

Awards: If the customer is currently a member in a loyalty program and there is an awards balance that could be applied against the order, the Awards button is displayed, with a message such as Customer has loyalty member balance of 5.00 USD, where 5.00 is the current eligible loyalty awards balance and USD is the *Currency Code*.

The Awards button is not displayed if the customer is currently a member of more than one loyalty program but you did not use the *Select Card Window* to select a card to apply awards to the order.

Note:

The loyalty prompts may also be displayed here if the customer is not enrolled in any loyalty programs. See *Use the Prompt to Join Loyalty* for more information.

Apply Awards Window Fields

The fields at the *Apply Awards* window are:

- Loyalty Program Name: The description of the customer's loyalty card in Customer Engagement. From the retrieveCustomer response message.
- Award Program Name and Code: The award program name and the numeric ID of the award program in Customer Engagement. From the getCardInquiryData response message.
- Award Balance: The award balance that is eligible to apply to the current order. From the getCardInquiryData response message.
- Amount to Apply: Optionally, enter the amount to the apply to the current order.

To support multiple ship-to addresses, each award under the selected loyalty card repeats per ship-to.

Customer Information Fields

The Customer Information component displays in the upper left. Display-only. Select **Edit** to update the customer; see *Edit Customer Information* for more information.

If using QAS: If you are using QAS and QAS updated the address, the updated address is displayed. See the *Use QAS Address Interface (I67)* system control value in the Classic View online help for more information.

Order Information Fields

The Order Information component displays in the upper right. Display-only. Select **Edit** to open the *Order Settings Window*.

Ship To Fields

For Delivery orders, a separate **Ship-To** displays below the customer and order information components for each Ship-To added to the order sorted by ship-to number. Each ship-to has an **+Add Items** button to go directly to the *Items (Order Entry Step 3)* tab to add items to the selected ship-to.

This section includes the shipping address. See *Ship-To Address* for more information. The *Attention* field, as well as the customer's *Prefix* and *Suffix*, are also displayed, if specified.

If using QAS: If you are using QAS and you entered an alternate shipping address, the updated shipping address is displayed. See the *Use QAS Address Interface (I67)* system control value in the Classic View online help for more information.

Display-only. Select **Edit** to update the ship-to information; see *Edit Ship To Information* for more information.

Pickup Location Fields

The following information is displayed for the selected pickup location in the **Select Store** drawer:

Store Name

Store Address

Store Phone Number: Optionally, click the phone number to call the store location if the **Phone** flag in Work with Contact Center (WWCC) has **Select to set as a hyperlink** selected.

Store Email Address: Optionally, click the email address to generate an email to the store location if the **Email** flag in Work with Contact Center (WWCC) has **Select to set as a hyperlink** selected.

Indication if the order is **Shipping to Store** or available for **Store Pickup**.

The remaining fields are display-only. Select **Edit** to update the pickup location; see *Edit Pickup Information* for more information.

Items Fields

Items are listed in reverse chronological order (newest first) based on when they were added to the order. Set components are listed after the main set item.

Item Image: Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no item or SKU image has been defined.

Item Information Link: Displayed if the *Use External Item Image (L55)* system control value is selected and an item information link has been defined. Indicated by an exclamation point in the item image.

Item Description and *Item ID*. These provide a link to item information, if defined; otherwise, display-only.

SKU. Display-only.

The messages icon () to the right of an item enables you to enter or work with order line messages. See the *Messages Window (Items)* for more information.

Ordered (*Ordered Quantity*). Display-only.

Unit Price (*Order Line Price*) after applying any discounts or price breaks. Display-only.

> **Note:**
>
> The price at this step is updated if the price specified for the offer associated with the source code entered at the *Enter or Verify Customer Information Fields* is different from the price from the default *Current Offer (A33)* system control value.

> **Note:**
>
> The price might be set to 0.00 at this step if the offer has expired.

Extended Price. Display-only.

Gift Wrap. Displayed as Yes only if the item has gift wrap. Display-only.

Reserved (*Reserved Quantity*): Displayed only if a quantity is reserved. Not displayed for a pickup order.

Personalization:

- **If personalization has already been defined:** The additional charge code and description (for example, M - MONOGRAMMING) is displayed as a link. You can click the link to open the *Personalization Information* window.
- **If personalization has not already been defined:** If the item is eligible for personalization, based on the **Special Handling** setting for the Item Offer or SKU Offer, you can click the Personalization link to open the *Add Personalization* window. See that window for more information on fields, options, and conditions on when this window opens.

Ship Via description and code. Displayed if the item has a ship via override.

Messages about items: The following status messages are displayed for each order line if item is:

- Sold out, indicating the number of units sold out.
- On backorder, indicating the number of units on backorder. This message is not displayed if the item is flagged as **OROB Eligible**, or if this is a store pickup or ship-for-pickup order.
- A *Drop Ship* item, and the *Expected Ship Date*. If this is not a drop ship item, the *Expected Ship Date* is shown only if there is a PO Layering record. If you use warehouse lists, the *Expected Ship Date* might not be displayed even if there is a PO Layering record if the item would not be fulfilled from the warehouse for the PO Layering record.
- Added to the order as a free gift, including:
  - Message indicates `Free gift added to the order`:
    - A free gift added through a promotion (WPRO).
    - A free gift defined for an offer or source code.
    - A premium item added through a price table promotion (WPTB).
  - Message indicates `Package insert added to the order`: A package insert (WPIP).

The **Edit** and **Delete** options are also available for each item. See *Edit* and *Delete* for more information.

Additional Information Fields

The following fields are display-only.

Source Code

Delayed Arrival

Gift Order

Ship Via code and description

Calculate Shipping (Freight)

Tax Code

Ship Complete

Tax Identification

Add Payment Fields

Payment Balance: Indicates the payment amount currently required for the order. This amount decreases as you add partial payment methods. The currency for the payment is shown next to the payment amount based on the source code entered on the customer information tab. This currency displayed is based on the following hierarchy:

1. If *Multi Currency by Offer (E03)* system control value is Yes, the currency shown is from the offer associated to the source code on the order.
2. If *Multi Currency by Offer (E03)* system control value is No, the currency shown is from the *Local Currency Code (A55)* system control value setting.

The fields available when you add a payment method through the initial *Add Payment* window are listed below.

Express bill ship via? If you specified an express-bill *Ship Via* for the order, authorization for a credit or debit card is required before you can accept the order. If on-line authorization is not enabled, you need to authorize the card manually.

Initial Add Payment Window Fields

Select the Payment Method from the list. Listed payment methods can include:

- Cash/check payment methods defined through the **Work with Pay Types (WPAY)** menu option in Classic View.
- Stored value card (gift card) payment methods defined through the **Work with Pay Types (WPAY)** menu option in Classic View.
- Credit or debit card payment methods defined through the Payment Method Details window from the Payment Configurations option. In this case, the Payment Method Description is displayed. Only credit or debit card payment methods that are not flagged as Restricted are available for selection.

> **Note:**
>
> Pay type records that have a **Card Type** of **Wallet** as viewed in the Classic View **Work with Pay Types** (WPAY) are excluded from the list of payment methods shown in *Add Payment*. Additionally, any pay type with associated to the PayPal (PPL) authorization service is not displayed.

Optionally, you can also enter the *Amount to Charge*. Required for a cash/check pay type. Leave this field blank if the payment method is the catch-all for the order.

Additional fields displayed when you select a payment method: After you select a payment method and click OK, the additional fields displayed at the full Add Payment window vary depending on whether the selected payment method is a cash/check, stored value card (gift card), or credit/debit card pay type.

The **Edit** option is available at the full Add Payment window by selecting the edit icon ( ).

> **Note:**
>
> When you select the Edit option, your previous entries at the full Add Payment window are cleared for you to begin payment entry again.

Additional fields for the different pay types are listed below.

Cash/Check Payment Fields

The Add Payment window displays the following additional fields when you select a cash/check payment method from the **Payment Method** drop down field.

Payment Method indicates the description of the selected cash/check pay type, as set up through the Work with Pay Types (WPAY) option in Classic View. Display-only.

Amount to Charge entered at the initial Add Payment window. Display-only.

Edit option, as described above.

Routing Number

Account Number

Check Number

Stored Value Card (Gift Card) Payment Fields

The Add Payment window displays the following additional fields when you select a stored value card (gift card) payment method from the **Payment Method** drop down field.

Payment Method indicates the description of the selected stored value card pay type, as set up through the Work with Pay Types (WPAY) option in Classic View. Display-only.

Amount to Charge. The amount that you entered at the initial Add Payment window. Display-only.

Edit option, as described above.

Card Number. Required. The option to *Check Gift Card Balance* is available above the *Card Number* field.

Start Date: The **Start Date** field displays and is required only if the **Require Start Date** field is selected for the pay type in the **Work with Pay Types (WPAY)** menu option.

Expiration Date: Required only if the **Require Expiration Date** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option.

Issue Number: The **Issue Number** field displays and is required only if the **Require Start Date** field is selected for the pay type in the **Work with Pay Types (WPAY)** menu option.

Card ID Number

Manual Authorization: Select this option to apply a manual authorization to the credit card payment. If you select this option, you must complete the following fields:

- *Manual Authorization Amount*

- *Authorization Date*
- *Authorization Number*

> **Note:**
>
> The **Manual Authorization** field displays only if you have authority to the *C/C Authorization Field Access (A25)* secured feature.

> **Note:**
>
> If you leave the **Manual Authorization** option unselected and the payment still requires authorization at pick slip generation time, the system will perform batch credit card authorization for the credit card payment during pick slip generation.

Credit/Debit Card Payment Fields

All card validation and processing is performed through Oracle Retail *EFTConnect* .

The Add Payment window displays the following fields when you select a credit or debit card payment from the **Payment Method** drop down field. The payment processor determines which fields are required besides the card number.

Payment Method displays the *Payment Method Description* as set up through the **Payment Method Details** window from the Payment Configurations option. Display-only.

Amount to Charge entered at the initial Add Payment window, or the total not included in another payment method for the catch-all. Display-only.

Card Number. The maximum card length and any additional validation is defined by the payment provider. Required.

Expiry Month and *Expiry Year*: the *Expiration Date*. MM and YY format.

The card data is validated by the payment provider and a temporary token is returned if successful. The system displays a message indicating the payment was added to the order. Authorization occurs automatically when you submit the order. See *Submit Order*.

Payment Detail Fields (Payment Methods Currently on the Order)

The following information is displayed for each payment method that you have added to the order.

- *Payment Method* Description and information on the payment method, including *Check Number*, last four positions of the *Card Number* for a credit card or stored value card.
- *Expiration Date* for a stored value card.
- *Amount to Charge*. **Balance** indicates the catch-all payment method.

Payment Method Details Window Fields

The following information is displayed in the **Payment Method Details** window when you select **View Details** for a payment method on the order from the actions menu (⋮) at the *Add Payment* step.

Cash/Checks:

Payment Method Description

Account Number

Routing Number

Check Number (in parentheses after payment method description)

Stored Value Card (Gift Card):

Payment Method Description

Last 3 digits of gift *Card Number* (in parentheses after payment method description)

Expiration Date

Issue Number

Start Date

Credit Card:

Payment Method Description

Last 4 digits of *Card Number* (in parentheses after payment method description)

Expiration Date

Transactions:

The following fields are blank if there has not been an authorization request.

- *Type* (*Payment Transaction Type*)
- *Status* (*Payment Transaction Status*)
- *Amount* (*Payment Transaction Amount*)
- *Expiration*
- *Payment Processor Response*
- *Address Verification Response*
- *Card Verification Response*
- *Sent Date* (*Payment Transaction Send Date*)
- *Authorization Request Identification*
- *Authorization Number*
- *Create Date* (*Payment Transaction Create Date*)
- *Approval Date* (*Payment Transaction Approval Date*)
- *Vendor Response 1*
- *Vendor Response 2*
- **Activity:**

  The Activity fields are not currently used in order entry.
- *User*
- *Invoice*

- *Date*
- *Note*

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Search for Orders or Customers

Overview: Use the **Search for Orders or Customers** page to search for orders or customers.

These search options are also available at the *Home* page; also, the customer search options are available at the *Order Entry* search page.

The page is split into two separate panels:

- The *Search for Orders Panel* allows you to search for an order using information related to the order:
  - *Order Number*
  - *Order Date*
  - *Invoice* **Number**
  - *Alternate Order Number*
  - *Last 4 Digits of Payment Card*
  - *Item ID* and *SKU*
  - *Order Status*
  - *Origin (Order Type)*
  - *Pick Control Number*
  - *User ID*
  - *Sales Representative Number*

It is common to enter information in several fields when searching for a specific order. For example, you might enter values in the **Item ID**, **Order Status**, and **Order Date** fields.

- The *Search for Customers Panel* allows you to search for a customer using information related to the customer:
  - *Email Address*
  - *Phone Number*
  - *Last Name*
  - *Company Name*
  - *Postal Code*
  - *Customer Number*
  - *Match Code*
  - First Name

It is common to enter information in several fields when search for a specific customer. For example, you might enter values in the **Last Name** and **Postal Code** fields.

Search results: If your search results are:

- **Multiple orders**: The matching orders are displayed on this page.
- **Multiple customers:** The matching customers are displayed on this page.
- **A single order:** You advance to the *Order Summary* page for the order.
- **A single customer:** You advance to the *Customer Order List* page for the customer.

How to display: Select **Search** from a menu.

From Home page: You also advance to this page when you perform a customer or order search from the *Home* page if there are multiple matching customers or orders. If there is a single match, you advance directly to the **Order Summary** or **Customer Order List** page, as described above.

In this topic:

- *Search for Orders or Customers: Initial Field Display*

For more information:

- *Search for Orders or Customers Options* for step-by-step instructions on the actions you can perform on the **Search for Orders or Customers** page.
- *Fields on Search for Orders or Customers* for a description of the fields on the **Search for Orders or Customers** page.

Search for Orders or Customers: Initial Field Display

When you first advance to the **Search for Orders or Customers** page, the system uses the configuration settings defined in the **Work with Contact Center (WWCC)** menu option in Classic View to determine which fields to display on the page for the currently selected company.

- The **Contact Center Field Display** screen in the **Work with Contact Center (WWCC)** menu option controls which fields display on the **Search for Orders or Customers** page for the specified company. You can define whether the *Sales Representative Number* and *Phone Number* display on this page. See *Fields on Search for Orders or Customers* for a complete list of the fields that can display for this page.
- The **Contact Center Order Search Field Sequence** screen in the **Work with Contact Center (WWCC)** menu option controls the sequence of the fields that display in the *Search for Orders Panel* and *Search for Customers Panel* for the specified company. In addition, this page also controls which fields initially display in each panel before you need to select the **> Additional Order Search Fields** link or the **> Additional Customer Search Fields** link to display the remaining fields in the panel.

Delivered Order Search Field Sequence Settings

The delivered sort order for the **Search for Orders** panel is:

- *Order Number*
- *Order Date*
- *Invoice* Number
- *Alternate Order Number*

- *Last 4 Digits of Payment Card*
- *Item ID* and *SKU*
- *Order Status*
- *Origin (Order Type)*
- *Pick Control Number*
- *User ID*
- *Sales Representative Number*

The delivered number of **Order Quick Search** fields is **1**. When using the default sort order, only the **Order Number** field initially displays before you need to select the **> Additional Order Search Fields** link to display the remaining fields.

The delivered sort order for the **Search for Customers** panel is:

- *Email Address*
- *Phone Number*
- *Last Name*
- *Company Name*
- *Postal Code*
- *Customer Number*: If the *ORCE Customer Integration (L37)* system control value is set to INTERACT and the Use Oracle Retail Customer Engagement Customer Number in Search flag is selected in Work with Contact Center (WWCC), then when you search based on customer number, your entry should be the Customer Engagement customer ID.
- *Match Code*
- *First Name*

The delivered number of **Customer Quick Search** fields is **6**. When using the default sort order, the **Email Address**, **Phone Number**, **Last Name**, **Company Name**, **Postal Code**, and **Customer Number** fields initially display before you need to select the **> Additional Customer Search Fields** link to display the remaining fields.

> **Note:**
>
> Once a user uses the **Work with Contact Center (WWCC)** menu option to change the delivered order search field sequence settings, there is no way to reset to the default settings unless you manually update the configuration to match the default settings as defined above.

Search for Orders or Customers Options

Purpose: You can perform the following actions on the **Search for Orders or Customers** page.

- *Display Additional Search for Orders Fields*
- *Search for an Order*
- *Clear the Fields in the Search for Orders Panel*

- *Display Additional Search for Customers Fields*
- *Search for a Customer*
- *Clear the Fields in the Search for Customers Panel*
- *Customer Search Result Options*
- *Order Search Result Options*
- *Start a New Search*

For more information:

- *Search for Orders or Customers* for an overview of the **Search for Orders or Customers** page.
- *Fields on Search for Orders or Customers* for a description of the fields on the **Search for Orders or Customers** page.

Display Additional Search for Orders Fields

In the *Search for Orders Panel*, select **> Additional Order Search Fields** to display the additional order fields that are available for an order search.

> **Note:**
>
> The **Contact Center Order Search Field Sequence** screen in the **Work with Contact Center (WWCC)** menu option controls which fields to initially display in the **Search for Orders** panel. If the **Search for Orders** panel is configured to display all fields, the **> Additional Order Search Fields** option does not display.

Search for an Order

1. Complete one or more of the order fields in the *Search for Orders Panel*; see *Order Search Field Validation* for the validation that occurs for each field.
2. Select the **Search Orders** option. The system validates your entries and searches for orders that meet all of your search criteria.
   - If the system finds a single order that meets your search criteria, you advance to the *Order Summary* page for the order.
   - If the system finds more than one order that meets your search criteria, the results are displayed in the *Order Search Results Fields*. **Note:** If the number of orders found is greater than the maximum search results of 500 records, the system displays an error message. In this situation, the system retains your search criteria so that you can refine your search and try again.
   - If no orders meet your search criteria, the system displays an error message. In this situation, the system retains your search criteria so that you can review and modify your search.

> **Note:**
>
> In order to perform an order search by pressing **Enter**, your cursor must be in one of the order fields. Searching by pressing **Enter** is available only for fields that are not associated with a drop down list of values.

Order Search Field Validation

Order Number Search: Enter a complete and valid *Order Number* to find an order that matches your entry.

> **Note:**
>
> If you search by order number, the system ignores any other search criteria that you enter.

Order Date Search: Enter a complete and valid *Order Date* in user date format, or select a date from the calendar, to find orders whose order header date matches your entry.

- You can enter a date that is earlier, equal to, or later than the current date.
- Enter the date in the date format defined for your user ID. For example, if the date format for your user ID is set to YY/MM/DD and you enter 12/12/12, the system recognizes this date as 2012, December 12 and searches for orders that were created on that date.
- 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.

Invoice Number Search: Enter a complete and valid *Invoice* number to find orders whose invoice number matches your entry.

Alternate Order Number Search: Enter a full or partial *Alternate Order Number* to find orders whose **Alternate order number** starts with your entry.

Orders from Order Broker: To review orders from Order Orchestration whose originating system is Order Administration, enter `ORIG#:` in this field and select the **Search Orders** option to have the *Search for Orders or Customers* page display order results where all orders whose **Alternate Order Number** in the Order Header Extended table begin with `ORIG#:` display.

Last 4 Digits of Payment Card Search: Enter the *Last 4 Digits of Payment Card* to find orders that contain a payment card whose last four digits match your entry.

Item ID and SKU Search:

- Enter a valid *Item ID* to find orders that contain an item ID that matches your entry, regardless of SKU.
- Enter a valid *Item ID* and *SKU* to find orders that contain an item ID and SKU combination that matches your entry.
- Enter a valid *Item ID* and select the **Populate SKU Options** icon to retrieve the valid SKU's for the item. Once the SKU's are retrieved:
  – Select the **SKU** field to display the SKU drop down list.

- Enter a full or partial SKU in the drop down list search field to find SKU's that contain your entry.
- Select a SKU from the drop down list to populate the **SKU** field.

Note: The SKU is made up of three four position fields. If you search on more than one SKU element, you must enter the full four positions for each field. For example:

- If you search for RED SML, you must type `RED  SML`, where the space between `RED` and `SML` is two blank spaces. You need to enter one space to represent the forth position of the `RED` SKU element and the other space represents the space between the SKU elements.
- If you search for BLUE SML, you must type `BLUE SML`, where the space between `BLUE` and `SML` is one blank space to represent the space between the SKU elements.

Order Status Search: Select a valid *Order Status* from the list to find orders whose order header status matches your entry.

You can search for an order in a **Canceled**, **Error**,**Held**, **Open**, **Quote**, **Suspended**, or **Closed** status.

Origin Search: Select a valid *Origin (Order Type)* from the list to find orders whose origin matches your entry.

Pick Control Number Search: Enter a valid *Pick Control Number* that is associated with an invoice to find an order whose pick control number matches your entry.

Pick Control Numbers associated with an invoice only: The system includes only pick control numbers associated with an invoice when you search for orders by pick control number (the pick control number has been billed and is assigned to an invoice in the Invoice Detail table). If you enter a pick control number that has not yet been billed and perform an order search, the system displays an error message indicating no orders were found, even if this pick control number is associated with an order.

> **Note:**
>
> If you search for orders using order search criteria other than pick control number, the system will return orders that meet your search criteria, regardless of whether any picks for the order have been billed.

User ID Search: Select a *User ID* and *User Name* to find orders whose entered by user ID matches your selection.

User Suggestions: If you enter any characters in this field, the system displays any user IDs or user name that contain your entry.

User ID Lookup: Select the prompt arrow next to the *User ID* field to advance display a list of user IDs.

Sales Representative Number Search: Enter a valid and active sales representative number to find orders whose sales representative number matches your entry, or select the prompt arrow next to the *Sales Representative Number* field to display a list of active sales representatives.

Active Sales Representatives only: The system includes only active sales representatives when you search for orders by sales representative (the **Active** field for the sales representative is selected in the **Work with Sales Representative (WSLS)** menu option). If you enter an inactive sales representative and perform an order search, the system displays an error message indicating the sales representative number was not found, even if this inactive sales representative is associated with an order.

> **Note:**
>
> If you search for orders using order search criteria other than sales representative, the system will return orders that meet your search criteria, regardless of the active status of the sales representative associated with the order.

Batch Number Search: Enter a valid *Batch Number* associated to an order to display a list of all orders with that specific batch number. Orders in an error batch can be searched by a specific batch number.

Clear the Fields in the Search for Orders Panel

Select the **Clear** option next to the **Search Orders** button. The system removes all of your entries in the fields associated with the **Search for Orders** panel.

Display Additional Search for Customers Fields

In the *Search for Customers Panel*, select **> Additional Customer Search Fields** to display the additional customer fields that are available for a customer search.

> **Note:**
>
> The **Contact Center Order Search Field Sequence** screen in the **Work with Contact Center (WWCC)** menu option controls which fields initially display in the **Search for Customers** panel before you need to select the **> Additional Customer Search Fields** link to display the remaining fields in the panel. If the **Search for Customers** panel is configured to display all fields, the **> Additional Customer Search Fields** option does not display.

Search for a Customer

1. Complete one or more of the customer fields in the *Search for Customers Panel*. See *Customer Search Field Validation* for the validation that occurs for each field.
2. Select the **Search Customers** option or press **Enter**. The system validates your entries and searches for customers that meet all of your search criteria.
   - If the system finds a single customer that meets your search criteria, you advance to the *Customer Order List* page.
   - If the system finds more than one customer that meets your search criteria, the matching customers are listed in the *Customer Search Results Fields*. **Note:** If the number of customers found is greater than the maximum search results of 500 records, the system displays an error message. In this situation, the system retains your search criteria so that you can refine your search and try again.

- If no customers meet your search criteria, the system displays an error message. In this situation, the system retains your search criteria so that you can review and modify your search.

> **Note:**
>
> - If you search by customer number, the system ignores any other search criteria that you enter.
> - In order to perform a customer search by pressing **Enter**, your cursor must be in one of the customer fields. Searching by pressing **Enter** is available only for fields that do not have a defined drop down list of values.
> - The system does not include *Ghost Customer*s in the customer search results. You can identify a ghost customer by the setting of the **Ghost** flag.

Search in Customer Engagement? If the *ORCE Customer Integration (L37)* system control value is set to INTERACT:

- *Customer(s) found in Customer Engagement?* If Customer Engagement returns any customer records, they are displayed in the customer search results:
  - If a customer returned in the response is selected, and the customer did not previously exist in Order Administration, the customer record is created, and an Order Administration customer number is assigned.
  - If the customer returned in the response and selected did previously exist in Order Administration but was not assigned a Customer Engagement ID, the customer record in Order Administration is updated with the ID passed from Customer Engagement, as well as the name and address information from Customer Engagement.
  - If a customer returned in the response is selected and previously existed in Order Administration with a Customer Engagement ID assignment, the customer's name and address information are updated with the information from Customer Engagement.
- *Customer not found in Customer Engagement?* If there are no matches returned from Customer Engagement, any matching records in the Order Administration Customer Sold To table are displayed. If there is only one matching record, Order Administration sends the customer information to Customer Engagement. Customer Engagement creates a record for the customer and sends the new Customer Engagement ID to Order Administration, and Order Administration updates the customer record with the ID.

The page indicates whether the search results were found in Customer Engagement or in Order Administration.

Customer Search Field Validation

Email Address Search: Enter a valid *Email Address* to find customers whose email address matches your entry. The email address you enter can be the customer's primary email address or a secondary email address.

In order to search on email address, the system verifies that:

- There is an @ sign and a period (.).
- There is some text before the @ sign, between the @ sign and the period, and after the period.

Phone Number Search: Enter a full or partial *Phone Number* to find customers whose home, business, or mobile (fax) phone numbers match your entry.

First Name Search: Enter a full or partial First Name to find customers whose first names start with your entry.

Last Name Search: Enter a full or partial *Last Name* to find customers whose last names start with your entry.

Company Name Search: Enter a full or partial *Company Name* to find customers whose company names start with your entry.

Postal Code Search: Enter a full or partial *Postal Code* to find customers whose postal codes start with your entry. When searching for a customer based on postal code, your entry should not exceed the number of positions indicated in the *Postal Code Scan Length (F61)* system control value.

Customer Number Search: Enter a valid *Customer Number* to search for customers whose sold to customer number matches your entry.

Search based on Customer Engagement ID? If the *ORCE Customer Integration (L37)* system control value is set to INTERACT and the Use Oracle Retail Customer Engagement Customer Number in Search flag is selected in Work with Contact Center (WWCC) and your entry is a valid ORCE Customer ID, the matching customer is displayed.

Search based on Order Administration customer number? If:

- – The *ORCE Customer Integration (L37)* system control value is not set to INTERACT, or if
  – The *Use Oracle Retail Customer Engagement Customer Number in Search* flag is not selected in Work with Contact Center (WWCC), and your entry is a valid Order Administration customer number, then
  – The matching customer is displayed.
- Otherwise, no results are displayed.

> **Note:**
>
> If you search by customer number, the system ignores any other search criteria that you enter.

Match Code Search: Enter a full or partial *Match Code* to find customers whose match code starts with your entry.

Clear the Fields in the Search for Customers Panel

Select the **Clear** option next to the **Search Customers** button. The system removes all of your entries in the fields associated with the **Search for Customers** panel.

Customer Search Result Options

If you searched based on customer information, you have the following options.

Select a customer for review or new order: Click a displayed customer name to open the *Customer Order List* page for the customer, where you can review the customer's orders and optionally enter a new order for the customer.

Review a customer's most recent order: Click a customer's most recent order number to advance to the *Order Summary* page for the order.

Call a customer: Select the *Phone Number* link to advance to the default application used to initiate phone calls. If a default application is not defined, a window displays where you can select the application to use to call the customer's phone number.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Phone** field in the **Work with Contact Center (WWCC)** menu option. In addition, the **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Email a customer: Select the *Email Address* link for a customer to advance to the default application used for email. If a default application is not defined, a window displays where you can select the application to use to email the customer.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Email** field in the **Work with Contact Center (WWCC)** menu option.

Filter the search results: The customer search results include the first 15 customer records matching your search criteria. Optionally, you can further filter the search results by using the **Filter results** field above the list of customers to enter one or more terms to search across any of the displayed information.

For example, if you enter 1200 in the **Filter results** field, the search results might be restricted to customers who live at a street address of 1200, have a phone number that includes 1200, or whose last order number included 1200. If you enter Spring, the result results might be restricted to customers whose last name is Spring, or who live on Spring Street.

> **Note:**
>
> - Only fields displayed in the customer search results are available for filtering. For example, you can filter based on the first line of the customer's street address, because it is displayed, but you cannot filter based on the apartment number.
> - You can remove a search filter by clicking the X next to the filter term.
> - The filtering is not restricted to the customers displayed on the first page of results. For example, if the only customer matching your entry is on the third page of results, this customer is displayed.

Sort the search results: You can sort on any column in the displayed customer search results by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Customer search results first display on this page in ascending company name, ascending customer last name sequence.

Order Search Result Options

If you searched based on order information, you have the following options.

Select an order: Select the *Order Number* link for a record in the search results to advance to the *Order Summary* page for the order.

If there is a batch number associated with the order, each order in Error status can be worked through in an attempt to resolve the error.

A link is not available if the order's status is **Error** and no batch number is associated with the order. This can happen when the browser is closed in Modern View whilst creating an order), the order is display-only, and no edits are allowed.

Batch Number: Orders in error that are received from an external system are assigned to an error batch. Searching on Batch Number (maximum 5 numbers) and clicking **Search** returns all orders that are in that specific batch.

Filter the search results: The customer search results include the first 15 orders matching your search criteria. Optionally, you can further filter the search results by using the **Filter results** field above the list of orders to enter one or more terms to search across any of the displayed information.

For example, if you enter 1234 in the **Filter results** field, the search results might be restricted to orders with a street address number or postal code of 1200. If you enter Spring, the result results might be restricted to orders for customers whose last name is Spring, or with a street address of Spring Street.

> **Note:**
>
> - Only fields displayed in the order search results are available for filtering. For example, you can filter based on the first line of the customer's street address, because it is displayed, but you cannot filter based on the apartment number.
> - You can remove a search filter by clicking the X next to the filter term.
> - The filtering is not restricted to the customers displayed on the first page of results. For example, if the only customer matching your entry is on the third page of results, this customer is displayed.

Sort the search results: You can sort on any column in the displayed order search results clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Order search results first display on this page in descending order date, ascending order number sequence.

Start a New Search

After performing a search, select **New Search** from the search field at the top of the page to clear the currently displayed orders or customers and restore the **Search for Orders** and Search for Customers fields, with each of these fields now empty.

Fields on Search for Orders or Customers

Purpose: The following information displays on the **Search for Orders or Customers** page.

- *New Search Fields*
  - *Search for Orders Panel*
  - *Search for Customers Panel*
- *Order Search Results Fields*
- *Customer Search Results Fields*

For more information:

- *Search for Orders or Customers* for an overview of the **Search for Orders or Customers** page.
- *Search for Orders or Customers Options* for step-by-step instructions on the actions you can perform on the **Search for Orders or Customers** page.

Search for Orders Panel

The **Contact Center Order Search Field Sequence** screen in the **Work with Contact Center (WWCC)** menu option controls the order in which the fields in the **Search for Orders** panel display. In addition, this screen also controls which fields initially display in the **Search for Orders** panel before you need to select the **> Additional Order Search Fields** link to display the remaining fields in the panel.

- *Order Number*
- *Order Date*
- *Invoice* Number
- *Alternate Order Number*
- *Last 4 Digits of Payment Card*
- *Item ID* and *SKU*
- *Order Status*
- *Origin (Order Type)*
- *Pick Control Number*
- *User ID*
- *Sales Representative Number*
- *Batch Number*

New Search Fields

The fields you use to perform an order or customer search are described below.

Search for Customers Panel

The **Contact Center Order Search Field Sequence** screen in the **Work with Contact Center (WWCC)** menu option in the Classic View of Order Administration controls the order in which the fields in the **Search for Customers** panel of the **Search for Orders or Customers** page display. In addition, this screen also controls which fields initially display in the **Search for Customers Fields** panel before you need to select the **> Additional Customer Search Fields** link to display the remaining fields in the panel.

- *Email Address*
- *Phone Number*
- First Name
- *Last Name*
- *Company Name*
- *Postal Code*
- *Customer Number*
- *Match Code*

Order Search Results Fields

This table displays the first 15 orders that matched your order search criteria. Select the *Order Number* link for a record in the search results to advance to the *Order Summary* page for the order. For each order record, the system displays the following fields:

- *Order Date*
- *Order Number*.
- *Order Status*
- *Order Total*
- **Sold To** *Customer Name* in last name, first name format, with the company also displayed if specified.
- **Sold To** *Customer Address*: The system does not display address lines 2, 3, or 4 or the apartment/suite number.
- *Recipient*: The ship-to customer name displays in last name, first name display. If a company name is defined without a ship-to customer name, the company name displays in place of the ship-to customer name. If the only recipient on the order is the sold-to customer, the sold-to customer name or company name displays.

If the order contains multiple ship-to customers, up to five ship-to customers display on separate lines. If there are more than five ship-to customers on the order, **+ # Additional Recipients** displays, where **#** is the `total number of ship-to customers - 5`.

If you use the Order Broker integration, the recipient customer for a store pickup or ship-for-pickup order is the store code and store name of the store location where the customer will pickup the order.

Customer Search Results Fields

This table lists the first 15 customers that matched the search criteria you entered on the *Search for Orders or Customers* page to search for a customer. For each customer record, the following fields display:

- **Customer #** (*Customer Number*):
- *Customer Name*: The customer name displays in last name, first name sequence.

  If a company name is also defined, the company name displays below the customer name.

  If a company name is defined without a customer name, the company name displays in place of the customer name.
- *Customer Address*: The customer address that displays here does not display address lines 2, 3, or 4 or the apartment/suite number.
- **Phone** (*Phone Number*): The **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Email Address*: If more than one email address is defined for the customer, up to five email addresses display on separate lines, with the primary email address first, followed by secondary email addresses in the order in which they were entered in the system. If there are more than five email addresses defined for the customer, **+ # Additional Email Addresses** displays, where **#** is the `total number of email addresses for the customer minus 5`.
- *Last Order* date and number, regardless of the current status of the order. Listed below the customer name.

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Customer Order List

Overview: Use the **Customer Order List** page to review orders placed by the specified sold-to customer. From this page, you can select an order for review and maintenance, as well as advancing to *Order Entry*.

How to display:

- Perform a customer search on the *Search for Orders or Customers* page when only one customer is found.
- Select a customer on the search results at the *Search for Orders or Customers* page.
- Click the *Customer Summary Fields* in the *Order Summary Panel* in order entry.
- Click the sold-to customer name and number at the *Sold-To Panel* of the *Order Summary* page.
- Select a customer on the *Manage Held Orders* page.

When you first advance to this page, customer orders display in descending order date (newest to oldest), and within order date, by descending order number sequence.

Lists available to display: The following lists are available from the Customer Order List page:

- **Orders** tab: The **Orders** tab is selected by default at this page when you select a customer.
- **Items** tab: Select this tab to display the *Customer Items List*.
- **Memberships** tab: Select this tab to display the *Customer Memberships List*.
- **Purchase History** tab: Select this tab to display the *Customer Purchase History List*. This information is provided by Customer Engagement, and the **Purchase History** tab is available only if the *ORCE Customer Integration (L37)* system control value is set to INTERACT.
- **Loyalty** tab: Select this tab to display the *Customer Loyalty List*. This tab is available only if the *ORCE Customer Integration (L37)* system control value is set to INTERACT, and the *Use ORCE Loyalty (M06)* system control value is selected.

For more information:

- *Customer Order List Options* for step-by-step instructions on the actions you can perform on the **Customer Order List** page.
- *Fields on Customer Order List* for a description of the fields on the **Customer Order List** page.

Customer Order List Options

Purpose: You can perform the following actions on the **Customer Order List** page.

- *Create Order*
- *Use the Prompt to Join Loyalty*

- *Update Customer Information*
- *Call the Customer's Phone Number*
- *Email the Customer*
- *Manage the Address Book*
- *Review Frequently Purchased Items*
- *Sort Listed Orders*
- *Filter Displayed Orders*
- *Select an Order for Review*
- *Review Items Purchased by the Customer*
- *Review Items Sold To or Returned by the Customer*
- *Review Registries or Create a Registry Order*
- *Review or Work with Loyalty Cards, Programs, or Awards for the Customer*

For more information:

- *Customer Order List* for an overview of the **Customer Order List** page.
- *Fields on Customer Order List* for a description of the fields on the **Customer Order List** page.

Create Order

Select the **Create Order** option to advance to the *Enter or Verify Customer Information* step in *Order Entry*.

> **Note:**
>
> This option is available only if you have authority to the **Contact Center Order Entry (CCOE)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option and for a user class in the **Work with User Classes (WUCL)** menu option.

Use the Prompt to Join Loyalty

Loyalty prompt options: A prompt to join loyalty is displayed below the customer's name and customer number, providing the following options:

- **Never:** Do not ask the customer again about joining loyalty. In this case, Order Administration sends a Customer Engagement Update Customer Request to update the ORCE_LOYALTY_PROMPT_ATTRIBUTE setting for the customer to FALSE so that Order Administration will not prompt the customer again to join the Loyalty program.
- **Not Now:** The customer is not joining loyalty now, but can be prompted again in the future. Order Administration does not send an update to Customer Engagement.
- **Enroll:** Enroll the customer in loyalty. See Updates at Loyalty Enrollment for information on the updates that take place when the customer enrolls.

Displayed when? The prompts are displayed only if:

- the *ORCE Customer Integration (L37)* system control value is set to INTERACT, and
- the *Use ORCE Loyalty (M06)* and *Prompt to Join Loyalty (M07)* system control values are selected, and
- the customer has an ORCE customer ID and is not already a loyalty member, and has not previously requested to stop prompting for loyalty membership, such as by selecting the **Never** option at the prompt.

Prompt wording: The ORCE_LOYALTY_REG_MESSAGE property (PROP) defines the wording of the prompt message.

You can also enroll the customer in loyalty through the process described under Enroll the Customer in a Loyalty Program if the customer is not already enrolled.

Update Customer Information

Select the **Edit** option to open the *Edit Customer (Sold-To) Information* panel.

> **Note:**
>
> This option is available only if you have authority to the **Enter/Maintain Orders (OEOM)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option and for a user class in the **Work with User Classes (WUCL)** menu option.

Call the Customer's Phone Number

Select the *Phone Number* link to advance to the default application used to initiate phone calls. If a default application is not defined, a window displays where you can select the application to use to call the customer's phone number.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Phone** field in the **Work with Contact Center (WWCC)** menu option. In addition, the **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Email the Customer

Select the *Email Address* link to advance to the default application used for email. If a default application is not defined, a window displays where you can select the application to use to email the customer.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Email** field in the **Work with Contact Center (WWCC)** menu option.

Manage the Address Book

Select the *Address Book* icon to open the *Address Book Drawer* to manage the details of the address book for the sold-to customer. The address book shows the exiting entries if any in alphabetical order by last name. Each entry shows the name, address, phone number, email address, and so on, that the order may be shipped to other than the customer's own primary address. The address book is the same as customer ship-to in *Work with Customers (WCST)*.

You can add, edit, or delete entries in the address book.

Add an Entry to the Address Book: Click **+ Add Address**. The *Address Book Form* opens. Enter the new name and address details. When done, click **OK** to create a new entry in the address book and closes the Address Book Form (if no error validation occurs). The new entry is added to the address book list. The Address Book Number is auto assigned when a new address entry is created based on the next available sequence number for the Customer. The Match Code is auto generated using the defined match code algorithm when Address Book entries are created and edited.

Edit an Entry in the Address Book: Select **Edit** from the actions menu (⋮). Make the required changes and click **Update** to save these changes. The address book list screen is refreshed. Even if no changes are made, a previous address record is written.

Delete an Entry in the Address Book: Select **Delete** from the actions menu (⋮). Selecting **OK** checks if the address is being used on the current order or if there is order history for the address book entry, deletes the address book entry, closes the confirmation dialog and refreshes the address book list screen so that the entry is no longer included in the list. If the address book entry has any order history, the entry cannot be deleted and a message is displayed.

The **X** option in the right corner is used to close the drawer.

Review Frequently Purchased Items

Click **Frequent Purchases** in the **Purchases** customer summary tile to open the *Frequently Purchased Items Panel*.

Review Registries or Create a Registry Order

Click **Registries** in the **Purchases** customer summary tile to open the Registries panel. This option is available only if the ORCE Customer Integration is enabled, there is a record for the customer in Customer Engagement, and the *Use ORCE Registries (M26)* system control value is selected

If the customer has more than one registry: Select a registry to display the fields and options for that registry. You can select **Return to Registries** at the top of the panel to return to the Registries panel, displaying all registries for the customer.

Registries are displayed here only if they have been published in Customer Engagement, and the current customer is the owner of the registry.

Registry options: When a single registry order is displayed:

- **Filter the items on the registry:** Enter a full or partial item code or description to restrict the displayed registry items.

- **Create a registry order:** Select **Create Registry Order** to advance to the *Customer Information (Order Entry Step 2)* step in order entry and create an order for the customer that includes one or more items in the registry. Note that the options in order entry are different when you are creating a registry order.

Available when? This option is available only if the displayed registry includes at least one item that is available to sell in Order Administration (that is, not a Store only item). See *Order Entry* for additional required system control values and other settings. The **Create Registry Order** option is also not available if you currently have order entry open in another tab, regardless of whether the order is for the currently displayed customer.

When would you create a registry order? You might create a registry order if:

- A customer wants to purchase items on their own wish list. For example, a customer might create a wish list for items needed for the first semester at college.
- A customer wants to purchase items remaining on a registry after the event occurs. For example, after a baby shower, the customer might want to purchase additional remaining items that were not given as gifts at the shower.

Sort Listed Orders

You can sort on any column in the **Orders** table by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Orders first display in the **Order List** table in descending order date, ascending order number sequence.

Column Sort by Activity

Activity sorted in descending sequence sorts by:

- Return alone
- Exchange, Return
- Exchange alone
- Backorder, Return
- Backorder, Exchange, Return
- Backorder, Exchange
- Backorder alone
- No activity

Activity sorted in ascending sequence sorts by:

- No activity
- Backorder, Exchange, Return
- Backorder, Exchange
- Backorder, Return
- Backorder alone
- Exchange, Return
- Exchange alone

- Return alone

Filter Displayed Orders

The *Customer Order List* page displays the first 15 records matching your search criteria from the *Search for Orders or Customers* page when you search based on customer-related criteria.

The page provides an entry field below the **Order List** panel with the message **Type to filter**. You can further refine the orders displayed in the *Orders Table* by entering one or more search terms found in any of the fields displayed in that table.

Example: Enter `Washington`. The displayed results include orders for recipients whose names are “Washington,” as well as customers whose addresses include “Washington” in the street address or city. Next, enter `George`. Displayed results are now further restricted to orders that include “George” in any of the fields displayed in the *Orders Table*, provided the orders also include “Washington.”

Matching records need to contain the search term, but do not need to start with the search term. For example, both `123.45` and `23.45` are matches for a search term of `23`.

Filtering is across all results: The filtering is not restricted to the orders displayed on the first page of results. For example, if the only order matching your entry is on the third page of results, this order is displayed.

Additional information on filtering:

- Only fields displayed at the *Orders Table* are available for filtering. For example, you can filter based on the order status, total, or recipient, because this information displayed, but you cannot filter based on an item on the order.
- You can enter an order status, such as Closed, to filter the results to include only closed orders.
- You can enter an order activity, such as Backorder or Return, to include only those orders that have had that activity.
- You cannot filter by:
  - The description of the order type.
  - The recipient customer’s company name, even though it is displayed.
- Filtering is not case-sensitive. For example, you can enter `closed` or `CLOSED` to display closed orders.
- To filter based on order date, include the date delimiters. For example, enter 8/27 rather than 827 to filter for an order date of August 27.
- You can filter based on numeric fields to display partial matches. For example, if the order total is 200.98, you can enter 200 or 98 to include the order in the search results.

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.

Select an Order for Review

Select the *Order Number* link to advance to the *Order Summary* page for the order in a new tab.

> **Note:**
>
> A link is not available if the order's status is **Error** or **Suspended**.

Review Items Sold to or Returned by the Customer

Select the **Purchase History** tab to advance to the *Customer Purchase History List*, where you can review order information sent from Customer Engagement. This tab is available only if the *ORCE Customer Integration (L37)* system control value is set to INTERACT.

Review Items Purchased by the Customer

Select the **Items** option to switch to the *Customer Items List* for the customer.

Review or Work with Loyalty Cards, Programs, or Awards for the Customer

Select the Loyalty option to switch to the *Customer Loyalty List* for the customer.

Fields on Customer Order List

Purpose: The following information displays on the **Customer Order List** page.

- *Customer Order List Tab Fields*
- *Customer Order List Page Title Fields*
- *Customer Information Panel Fields*
- *Customer Summary Tiles Fields*
- *Frequently Purchased Items Panel Fields*
- *Registries Panel Fields*
- *Orders Table Fields*

For more information:

- *Customer Order List* for an overview of the **Customer Order List** page.
- *Customer Order List Options* for step-by-step instructions on the actions you can perform on the **Customer Order List** page, including displaying the additional lists available from this page.

Customer Order List Tab Fields

The customer's name displays in the page tab for the **Customer Order List** page. If the customer does not have a last name, the first ten positions of the company name displays as the tab title.

Customer Order List Page Title Fields

The title and the tab of the **Customer Order List** page contains the following:

- If a customer last name exists, the title of the page displays the customer's name in first name, last name display.
- If a customer name does not exist, the title of the page displays the customer's company name.

- The *Customer Number* is in parentheses.
- The *Customer Since* date follows the customer name and number.

Customer Information Panel Fields

The customer information panel below the page title displays the following fields:

- On the left-hand side:
  - *Customer Name* or *Company Name*
  - The *Customer Number* is in parentheses following the customer name. When the Purchase History tab is available, this is the Customer Engagement ID.
  - *Customer Since* date. When the Purchase History tab is available, this is the signup date from Oracle Retail Customer Engagement.
  - The Loyalty Member icon and label (Loyalty Member), indicating that the customer is currently enrolled in one or more loyalty programs. See Customer Loyalty List for more information.
  - *Customer Class* (displayed only if the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is selected, regardless of whether a customer class is assigned to the customer)
- On the right-hand side:
  - *Customer Name*, including *Prefix* and *Suffix*, if specified, and or *Company Name*, followed by *Customer Address*
    - If a customer name and company name are defined, the company name displays below the customer name.
    - If a company name is defined without a sold-to customer name, the company name displays in place of the sold-to customer name.
  - *Phone Number* (unlabeled field below the **Customer Address**): The **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option. If more than one phone number is defined for the customer, the system uses the following hierarchy to display the phone number:
    1. home phone number that is always displayed (even when not populated)
    2. business phone number that also supports a phone extension
    3. mobile or fax phone number as determined by Third Phone Number Type (L53) system control value.
- *Email Address* (unlabeled field below the **Phone Number**): This field displays only if an email address is defined for the customer.
- *Opt-In Status* (unlabeled field below the **Email Address**): This field displays only if an email address is defined for the customer.
- *Address Book* entries are stored as Permanent Ship To's for the Customer (Sold To). Each entry is assigned a sequential number, referred to as the Address Book Number. The Address Book information is stored in the Customer Ship-To table. The address book is the same as customer ship-to in Work with Customers (WCST).

Address Book Drawer Fields

Below the Address Book title, the number of entries in the address book are shown. Underneath the number of entries, the **+ Add Address** options opens the Address Book Form to allow a new address book entry to be created.

The rest of the Address Book drawer lists, if any, entries in the Address Book. The entries are presented in three columns that are always shown even if no address book entries exist. The entries are sorted by Last Name, First Name.

Address column: Each entry displays all address data in uppercase.

1. First Name, Middle Initial, Last Name, (Address Book Number)
2. Company Name only shown if populated
3. Address Line 1, Address Line 2, Address Line 3, Address Line 4, Apartment/Suite, City, State/Province Code, Postal Code, Country Code

Phone column: ALL assigned phone numbers display in the Phone column listed in the following sequence/hierarchy:

1. Home (Day)
2. Business (Evening) - If an Extension is assigned, the "Extension" label and value display after phone number.
3. Mobile (Fax)

Email column: A single email address entry is displayed in the Email column for the address book entry. Email is shown as it is entered.

Address Book Form

Selecting the **Edit** option from the ellipsis of an existing entry or selecting **+ Add Address** will open the Address form that contains the following fields:

- Address Book Number —Blank during initial add but subsequently is displayed in parenthesis following the name for each entry. Display Only.
- Match Code (Display Only) - Blank during initial add as assigned when the address is committed to the database.
- *Prefix*: Optional.
- *First Name*: Optional.
- *Middle Initial*: Optional.
- *Last Name*: Required if a company name is not specified.
- *Suffix*: Optional.
- *Company Name*: Required if a last name is not specified.
- *Street Address 1*: Required.
- *Street Address 2-4*: Optional.
- *Apartment/Suite*: Optional.
- Country: Required. Defaults from *Default Country for Customer Address (B17)* system control value but can be overridden. Position to the correct country by typing the country name rather than the code.
- Postal Code: Required based on country configuration.
- City: Required.

- State/Province: Required to complete entry of the order if the selected country requires a state or province. No default.
- Delivery - Whether the address is residential or business. Defaults from *Default Delivery Code for New Order Entry Customers (D13)* system control value but can be overridden. If this value is blank, then the default for Delivery is No Distinction.
- *Email Address*: Optional.
- *Phone Number*:
  - Home Phone Number
  - Business Phone Number / Extension (Conditionally displayed for existing entries)
  - Mobile Phone Number (Conditionally displayed for existing entries. Fax Number is displayed, when *Third Phone Number Type (L53)* system control value. is set to Fax.)
  - **+Add Phone**: Always displayed for new entries and conditionally displayed for existing entries.
- Rent: Defaults from *Default Rent Name (D11)* but can be overridden.

> **Note:**
>
> *Use Zip/City/State Defaulting? (B13)* system control value has no effect on the Modern View address book.

Customer Summary Tiles Fields

Tiles to the right of the customer information panel provide the following information:

- Purchases (*Total Orders*). This tile includes a link to the *Frequently Purchased Items Panel*.
- *Lifetime Value*. The default *Currency Code* is indicated below this total.
- Return Rate (*Item Return Rate*)

Frequently Purchased Items Panel Fields

The **Frequently Purchased Items** panel displays up to five items in the customer's purchase history that appear in the greatest number of orders, regardless of the ship-to customer on the order or the status of the order line.

The system does not consider the quantity of the item purchased. For example:

- If a customer purchased item A1234 in black, red, and blue and sent 1 of each to 3 different ship-tos, the frequency in which the customer purchased that item is 1.
- If that customer placed a different order for item A1234 in yellow and black, 1 each, the frequency would change to 2.

If the item has SKUs, the base item is displayed and the totals include all SKUs.

Items display in this panel in most frequently purchased, most recent order date, ascending item ID sequence. The following is displayed for each item:

- *Item Image*: Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no item or SKU image has been defined.

> **Note:**
>
> The icon indicating that an *Item Information Link* is available is not displayed on the item image.

- *Item Description*
- *Item ID* (next to the item description, in parentheses)
- Total Orders: This is the total number of orders for the customer that include the item, across ship-tos.
- *Last Ordered Date*

Registries Panel Fields

If there is a single registry for the customer:

- Registry header information:
  - Registry name: The Name defined for the registry in Customer Engagement.
  - Customer name: The name of the customer, in Last name, First name order.
  - Registry type: The type of registry defined in Customer Engagement. Possible types are Gift Registry and Wish List.
  - Event type: The event type defined for a registry in Customer Engagement, such as Birthday Party or Wedding Shower. Not displayed for a Wish List.
  - Venue: The name of the venue, if any, specified in Customer Engagement for the registry. Not displayed for a Wish List.
  - Date: The Event Date defined in for the registry in Customer Engagement. Not displayed for a Wish List.
- Item information: Includes the item description for the item in Order Administration, followed by the item number or code and SKU, in parentheses.

  The *Item Image* and *Item Information Link* are also available, if they have been defined and are enabled.

  Store-only item: If there is no record of the item in Order Administration, the description is Store only item. You cannot add a store-only item to an order.
- Quantity desired: The requested quantity of the item defined for the registry in Customer Engagement.
- Quantity purchased: The quantity of the item that has already been purchased, either through Order Administration or another system integrating with Customer Engagement. The quantity displayed does not increase when you add the item to the current registry order; it increases after you submit the order. This quantity is not updated when the customer purchases the item on a non-registry order.

If there is more than one registry for the customer:

- Number of registries for the customer, such as 2 Registries Found.

- Registry information: The Name defined for the registry in Customer Engagement, and the venue for a gift registry.
- Date: The Event Date defined in for the registry in Customer Engagement. Not displayed for a Wish List.
- Registry type: Gift Registry or Wish List.

See *Review Registries or Create a Registry Order* for more information on options.

Orders Table

The **Orders** table retrieves the first 500 orders that matched your customer search criteria, and displays up to 15 at a time.

The message `No data to display` displays if the customer has not placed any orders.

For each order record, the **Order List** table displays the following fields:

- *Order Date*
- Order (*Order Number*)
- *Origin (Order Type)*
- Status (*Order Status*)
- Total (*Order Total*). The default *Currency Code* code is indicated to the left of the column heading in parentheses. If an order uses a different currency, the currency code is indicated to the left of the order total for that order.
- *Activity*
- *Recipient*: The ship-to customer name for each recipient displays in last name, first name format., and the company, if any, is below the customer name If a company name is defined without a ship-to customer name, the company name displays in place of the ship-to customer name. If the only recipient on the order is the sold-to customer, this is the sold-to customer name or company name, or both.
  - If the order contains multiple ship-to customers, up to five ship-to customers display on separate lines. If there are more than five ship-to customers on the order, **+ # Additional Recipients** displays, where **#** is the `total number of ship-to customers - 5`.
  - If you use the Order Broker integration, the recipient customer for a store pickup or ship-for-pickup order is the store code and store name of the store location where the customer will pickup the order.

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Customer Items List

Overview: Use the **Items** tab at the *Customer Order List* page to review the items ordered by the customer, advance to an order that includes a listed item, or check item availability.

You can use this page to update the customer's information, as described for the **Customer Order List**.

How to display: Select the **Items** option on the *Customer Order List* page.

When you first advance to this page, it displays items ordered in ascending date sequence (older to newer).

For more information:

- *Customer Items List Options* for step-by-step instructions on the actions you can perform at the **Customer Items List** page.
- *Fields on Customer Items List* for a description of the fields on the **Customer Items List** page.

Customer Items List Options

Purpose: You can perform the following actions at the *Customer Items List* page.

- *Create Order*
- *Use the Prompt to Join Loyalty*
- *Update Customer Information*
- *Call the Customer's Phone Number*
- *Email the Customer*
- *Review Frequently Purchased Items*
- *Review Registries or Create a Registry Order*
- *Sort Listed Items*
- *Filter Displayed Items*
- *Display Item Information*
- *Select an Order for Review*
- *Check Inventory for an Item*
- *Review Items Sold to or Returned by the Customer*
- *Review or Work with Loyalty Cards, Programs, or Awards for the Customer*
- *Return to the Order List Results*

For more information:

- *Customer Items List* for an overview of the *Customer Items List* page.

- *Fields on Customer Items List* for a description of the fields on the *Customer Items List* page.

Create Order

Select the **Create Order** option to advance to the *Enter or Verify Customer Information* step in *Order Entry*.

> **Note:**
>
> This option is available only if you have authority to the **Contact Center Order Entry (CCOE)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option and for a user class in the **Work with User Classes (WUCL)** menu option.

Use the Prompt to Join Loyalty

Loyalty prompt options: A prompt to join loyalty is displayed below the customer's name and customer number, providing the following options:

- **Never:** Do not ask the customer again about joining loyalty. In this case, Order Administration sends a Customer Engagement Update Customer Request to update the ORCE_LOYALTY_PROMPT_ATTRIBUTE setting for the customer to FALSE so that Order Administration will not prompt the customer again to join the Loyalty program.
- **Not Now:** The customer is not joining loyalty now, but can be prompted again in the future. Order Administration does not send an update to Customer Engagement.
- **Enroll:** Enroll the customer in loyalty. See Updates at Loyalty Enrollment for information on the updates that take place when the customer enrolls.

Displayed when? The prompts are displayed only if:

- the *ORCE Customer Integration (L37)* system control value is set to INTERACT, and
- the *Use ORCE Loyalty (M06)* and *Prompt to Join Loyalty (M07)* system control values are selected, and
- the customer has an ORCE customer ID and is not already a loyalty member, and has not previously requested to stop prompting for loyalty membership, such as by selecting the **Never** option at the prompt.

Prompt wording: The ORCE_LOYALTY_REG_MESSAGE property (PROP) defines the wording of the prompt message.

You can also enroll the customer in loyalty through the process described under Enroll the Customer in a Loyalty Program if the customer is not already enrolled.

Update Customer Information

Select the **Edit Customer** option to advance to the *Edit Customer (Sold-To) Information* panel.

> **Note:**
>
> This option is available only if you have authority to the **Enter/Maintain Orders (OEOM)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option and for a user class in the **Work with User Classes (WUCL)** menu option.

Call the Customer's Phone Number

Select the *Phone Number* link to advance to the default application used to initiate phone calls. If a default application is not defined, a window displays where you can select the application to use to call the customer's phone number.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Phone** field in the **Work with Contact Center (WWCC)** menu option. In addition, the **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Email the Customer

Select the *Email Address* link to advance to the default application used for email. If a default application is not defined, a window displays where you can select the application to use to email the customer.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Email** field in the **Work with Contact Center (WWCC)** menu option.

Review Frequently Purchased Items

Click **Frequent Purchases** in the **Purchases** customer summary tile to open the *Frequently Purchased Items Panel*.

Review Registries or Create a Registry Order

Click **Registries** in the **Purchases** customer summary tile to open the Registries panel. This option is available only if the ORCE Customer Integration is enabled, there is a record for the customer in Customer Engagement, and the *Use ORCE Registries (M26)* system control value is selected

If the customer has more than one registry: Select a registry to display the fields and options for that registry. You can select **Return to Registries** at the top of the panel to return to the Registries panel, displaying all registries for the customer.

Registries are displayed here only if they have been published in Customer Engagement, and the current customer is the owner of the registry.

Registry options: When a single registry order is displayed:

- **Filter the items on the registry:** Enter a full or partial item code or description to restrict the displayed registry items.
- **Create a registry order:** Select **Create Registry Order** to advance to the Customer Information (Order Entry Step 2) step in order entry and create an order for the customer that includes one or more items in the registry. Note that the options in order entry are different when you are creating a registry order.

Available when? This option is available only if the displayed registry includes at least one item that is available to sell in Order Administration (that is, not a Store only item). See *Order Entry* for additional required system control values and other settings. The **Create Registry Order** option is also not available if you currently have order entry open in another tab, regardless of whether the order is for the currently displayed customer.

When would you create a registry order? You might create a registry order if:

- A customer wants to purchase items on their own wish list. For example, a customer might create a wish list for items needed for the first semester at college.
- A customer wants to purchase items remaining on a registry after the event occurs. For example, after a baby shower, the customer might want to purchase additional remaining items that were not given as gifts at the shower.

Sort Listed Items

You can sort on any column in the **Items** table by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Filter Displayed Items

The page provides an entry field below the **Items** panel with the message **Filter results**. You can further refine the orders displayed in the *Items Table* by entering one or more search terms found in any of the fields displayed in that table.

Example: Enter `PEN`. The displayed results include order lines for items whose descriptions include “pen,” as well as any items that include “pen” in the item code. Next, enter `held`. Displayed results are now further restricted to order lines that are in Held status, provided the order lines also include “pen.”

Matching records need to contain the search term, but do not need to start with the search term. For example, both `123.45` and `23.45` are matches for a search term of `23`.

Filtering is across all results: The filtering is not restricted to the order lines displayed on the first page of results. For example, if the only order line matching your entry is on the third page of results, this order line is displayed.

Additional information on filtering:

- Only fields displayed at the *Items Table* are available for filtering. For example, you can filter based on the order line status, unit price, or purchase status, because this information displayed, but you cannot filter based an order total or special handling instructions.
- Filtering is not case-sensitive. For example, you can enter `closed` or `CLOSED` to display closed order lines.

- To filter based on order date, include the date delimiters. For example, enter 8/27 rather than 827 to filter for an order date of August 27.
- You can filter based on numeric fields to display partial matches. For example, if the unit price is 11.95, you can enter 11 or 95 to include the order in the search results.

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.

Display Item Information

Click a displayed item to open the *Item Information Link* for the item. The item code is a link only if item information has been defined for the item. Note that the item information icon is not displayed.

Select an Order for Review

In the *Items Table*, select an *Order Number* link to advance to the *Order Summary* page for the order.

> **Note:**
>
> A link is not available if the order's status is **Error** or **Suspended**.

Check Inventory for an Item

Select **Item Availability** for an item.

- If the *Use Merchandise Locator (I38)* system control value is unselected, or if the *Use Merchandise Locator (I38)* system control value is selected but the item is not eligible for merchandise locator, you advance to the *Item Availability* window.
- If the *Use Merchandise Locator (I38)* system control value is selected and the item is eligible for merchandise locator, you advance to the *Item Availability (Merchandise Locator)* window.
- For set items, the **Item Availability** option is available for the set component item and not the main set item.

The **Item Availability** option is available only for order lines whose status is **Open**, **Held**, **Soldout**, or **Express Bill**.

Review Items Sold to or Returned by the Customer

Select the **Purchase History** tab to advance to the *Customer Purchase History List*, where you can review order information sent from Customer Engagement. This tab is available only if the *ORCE Customer Integration (L37)* system control value is set to INTERACT.

Review or Work with Loyalty Cards, Programs, or Awards for the Customer

Select the Loyalty option to switch to the *Customer Loyalty List* for the customer.

Return to the Order List Results

Select the **Orders** tab to return to the *Customer Order List*.

Fields on Customer Items List

Purpose: The following information displays on the **Customer Items List** page.

- *Customer Items List Tab Fields*
- *Customer Items List Page Title Fields*
- *Customer Information Panel Fields*
- *Customer Summary Tiles Fields*
- *Frequently Purchased Items Panel Fields*
- *Registries Panel Fields*
- *Items Table Fields*

For more information:

- *Customer Items List* for an overview of the **Customer Items List** page.
- *Customer Items List Options* for step-by-step instructions on the actions you can perform on the **Customer Items List** page.

Customer Items List Tab Fields

The customer's name displays in the page tab for the **Customer Items List** page. If the customer record does not have a last name but there is a company name, the first ten positions of the company name displays as the tab title. If the customer record does not have either a last name or a company, the tab is blank.

Customer Items List Page Title Fields

The title and the tab of the **Customer Items List** page contains the following:

- If a customer last name exists, the title of the page displays the customer's name in first name, last name display.
- If a no name exists for the customer record but there is a company name, the title of the page displays the customer's company name.
- If the customer record does not have either a last name or a company, just the customer number is displayed.
- The *Customer Number* is in parentheses. When the Purchase History tab is available, this is the Customer Engagement ID.
- The *Customer Since* date follows the customer name and number. When the Purchase History tab is available, this is the signup date from Oracle Retail Customer Engagement.

Customer Information Panel Fields

The customer information panel below the page title displays the following fields:

- On the left-hand side:
  - *Customer Name* or *Company Name*. If the customer record has just a first name, no name is displayed.
  - The *Customer Number* is in parentheses following the customer name. When the Purchase History tab is available, this is the Customer Engagement ID.

  - The Loyalty Member icon and label (Loyalty Member), indicating that the customer is currently enrolled in one or more loyalty programs. See Customer Loyalty List for more information.
  - *Customer Since* date. When the Purchase History tab is available, this is the signup date from Oracle Retail Customer Engagement.
  - *Customer Class* (displayed only if the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is selected, regardless of whether a customer class is assigned to the customer)
- On the right-hand side:
  - *Customer Name*, including *Prefix* and *Suffix*, if specified, and or *Company Name*, followed by *Customer Address*
    - If a customer name and company name are defined, the company name displays below the customer name.
    - If a company name is defined without a sold-to customer name, the company name displays in place of the sold-to customer name.
  - *Phone Number* (unlabeled fields below the **Customer Address**): Up to three phone numbers (home, business, and mobile or fax) for the customer sold-to may be shown with the type shown in brackets such as (508) 652–3800 (Business). These phone numbers can added, edited, deleted and displayed within Edit Customer (Sold-To) Information. The *Home Phone Number* field is always displayed, even when not populated.

    The **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

    Select the Edit icon to
  - *Email Address* (unlabeled field below the **Phone Number**): This field displays only if an email address is defined for the customer.
  - *Opt-In Status* (unlabeled field below the **Email Address**): This field displays only if an email address is defined for the customer.

Customer Summary Tiles Fields

Tiles to the right of the customer information panel provide the following information:

- Purchases (*Total Orders*). This tile includes a link to the *Frequently Purchased Items Panel*..
- *Lifetime Value*. The default *Currency Code* is indicated below this total.
- Return Rate (*Item Return Rate*)

Frequently Purchased Items Panel Fields

The **Frequently Purchased Items** *Panel* displays up to five items in the customer's purchase history that appear in the greatest number of orders, regardless of the ship-to customer on the order or the status of the order line.

The system does not consider the quantity of the item purchased. For example:

- If a customer purchased item A1234 in black, red, and blue and sent 1 of each to 3 different ship-tos, the frequency in which the customer purchased that item is 1.

- If that customer placed a different order for item A1234 in yellow and black, 1 each, the frequency would change to 2.

If the item has SKUs, the base item is displayed and the totals include all SKUs.

Items display in this panel in most frequently purchased, most recent order date, ascending item ID sequence. The following is displayed for each item:

- *Item Image*: Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no item or SKU image has been defined.

> **Note:**
>
> The icon indicating that an *Item Information Link* is available is not displayed on the item image in the Frequently Purchased Items panel.

- *Item Description*
- *Item ID* (next to the item description, in parentheses)
- Total Orders: This is the total number of orders for the customer that include the item, across ship-tos.
- *Last Ordered Date*

Registries Panel Fields

If there is a single registry for the customer:

- Registry header information:
  - Registry name: The Name defined for the registry in Customer Engagement.
  - Customer name: The name of the customer, in Last name, First name order.
  - Registry type: The type of registry defined in Customer Engagement. Possible types are Gift Registry and Wish List.
  - Event type: The event type defined for a registry in Customer Engagement, such as Birthday Party or Wedding Shower. Not displayed for a Wish List.
  - Venue: The name of the venue, if any, specified in Customer Engagement for the registry. Not displayed for a Wish List.
  - Date: The Event Date defined in for the registry in Customer Engagement. Not displayed for a Wish List.
- Item information: Includes the item description for the item in Order Administration, followed by the item number or code and SKU, in parentheses.

  The Item Image and Item Information Link are also available, if they have been defined and are enabled.

  Store-only item: If there is no record of the item in Order Administration, the description is Store only item. You cannot add a store-only item to an order.
- Quantity desired: The requested quantity of the item defined for the registry in Customer Engagement.

- Quantity purchased: The quantity of the item that has already been purchased, either through Order Administration or another system integrating with Customer Engagement. The quantity displayed does not increase when you add the item to the current registry order; it increases after you submit the order. This quantity is not updated when the customer purchases the item on a non-registry order.

If there is more than one registry for the customer:

- Number of registries for the customer, such as 2 Registries Found.
- Registry information: The Name defined for the registry in Customer Engagement, and the venue for a gift registry.
- Date: The Event Date defined in for the registry in Customer Engagement. Not displayed for a Wish List.
- Registry type: Gift Registry or Wish List.

See *Review Registries or Create a Registry Order* for more information on options.

Items Table Fields

The **Items** table displays the first 15 items that the customer has previously ordered. For each customer purchase history record, the system displays the following fields.

> **Note:**
>
> The **Items** table does not include items on order lines that are in a **Quote**, **Suspended**, or **Purged** status.

- *Ordered Date*
- *Item Description* (the *Item ID* is to the right in parentheses): An item may display more than once for the same order if more than one item was purchased for a different price or on a different order line, or if the item contains SKU's and more than one SKU of the item was purchased.
- *SKU Description*: Displayed below the item description and ID if the item has SKUs.
- Status (*Purchase Status*): The table does not display order lines that are in a **Quote**, **Suspended**, or **Purged** status.
- *Unit Price*
- *Order Number*: Provides a link to the *Order Summary* page for the order.
- **Item Availability:**
  - If the *Use Merchandise Locator (I38)* system control value is unselected, or if the *Use Merchandise Locator (I38)* system control value is selected but the item is not eligible for merchandise locator, you advance to the *Item Availability* window.
  - If the *Use Merchandise Locator (I38)* system control value is selected and the item is eligible for merchandise locator, you advance to the *Item Availability (Merchandise Locator)* window.

> **Note:**

- For set items, the **Item Availability** option is available for the set component item and not the main set item.
- In *Order Summary* and *Customer Items List* pages, the **Check Item Availability** option is available only for order lines whose status is **Open**, **Held**, **Soldout**, **Suspended**, or **Express Bill**. It is not available for orders in **Error** status.

16 Customer Memberships List

Overview: With the v23.2.401.0 update, a new **Memberships** tab at the Customer List screen displays any existing membership programs for the customer. Information displayed includes:

- membership program name and code
- customer membership program status
- next release date when a new membership order is eligible for generation
- most recent date when a membership order was generated
- name of the membership recipient
- current shipping address for the membership

Use the **Memberships** tab at the *Customer Order List* page to view all the standard memberships for the customer (active and expired) for the specified sold-to customer. Standard memberships are programs used to generate regular periodic orders for a customer. For example, an order for a food or beverage item each month such as a “coffee of the month”. This tab does not show loyalty memberships that are based on order history. See *Customer Loyalty List* for information on loyalty memberships.

> **Note:**
>
> The memberships tab is always displayed but the returned data depends on the user’s authority to the **Enter/Maintain Orders(OEOM)** menu option. If the user's menu option authority for fast path OEOM is set to ALLOW or DISPLAY, the **Memberships** tab displays standard memberships for the customer. If the user's menu option authority for OEOM is set to EXCLUDE, the **Memberships** tab is shown but no data is displayed.

How to display: Select the **Memberships** option on the *Customer Order List* page. When you first advance to this page, it displays memberships ordered in membership program description order.

Available options: You can replace the credit or debit card payment method for an active membership program or edit the expiration date. See Replace Payment Method and Edit Expiration Date for more information.

For more information:

- *Customer Membership List Options* for step-by-step instructions on the actions you can perform on the **Customer Memberships List** page.
- *Fields on Customer Membership List* for a description of the fields on the **Customer Memberships List** page.

Customer Membership List Options

Purpose: You can perform the following actions on the **Customer Membership List** page.

- Create Order
- *Use the Prompt to Join Loyalty*
- *Update Customer Information*
- *Call the Customer's Phone Number*
- *Email the Customer*
- *Review Frequently Purchased Items*
- *Review Registries or Create a Registry Order*
- *Sort Listed Memberships*
- *Filter Displayed Memberships*
- *Replace Payment Method*
- *Edit Expiration Date*
- *Review Items Sold to or Returned by the Customer*
- *Review or Work with Loyalty Cards, Programs, or Awards for the Customer*
- *Return to the Order List Results*

For more information:

- *Customer Memberships List* for an overview of the **Customer Membership List** page.
- *Fields on Customer Membership List* for a description of the fields on the **Customer Membership List** page.

Create Order

Select the **Create Order** option to advance to the *Enter or Verify Customer Information* step in *Order Entry*.

> **Note:**
>
> This option is available only if you have authority to the **Contact Center Order Entry (CCOE)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option and for a user class in the **Work with User Classes (WUCL)** menu option.

Use the Prompt to Join Loyalty

Loyalty prompt options: A prompt to join loyalty is displayed below the customer's name and customer number, providing the following options:

- **Never:** Do not ask the customer again about joining loyalty. In this case, Order Administration sends a Customer Engagement Update Customer Request to update the ORCE_LOYALTY_PROMPT_ATTRIBUTE setting for the customer to FALSE so that Order Administration will not prompt the customer again to join the Loyalty program.

- **Not Now:** The customer is not joining loyalty now, but can be prompted again in the future. Order Administration does not send an update to Customer Engagement.
- **Enroll:** Enroll the customer in loyalty. See Updates at Loyalty Enrollment for information on the updates that take place when the customer enrolls.

Displayed when? The prompts are displayed only if:

- the *ORCE Customer Integration (L37)* system control value is set to INTERACT, and
- the *Use ORCE Loyalty (M06)* and *Prompt to Join Loyalty (M07)* system control values are selected, and
- the customer has an ORCE customer ID and is not already a loyalty member, and has not previously requested to stop prompting for loyalty membership, such as by selecting the **Never** option at the prompt.

Prompt wording: The ORCE_LOYALTY_REG_MESSAGE property (PROP) defines the wording of the prompt message.

You can also enroll the customer in loyalty through the process described under Enroll the Customer in a Loyalty Program if the customer is not already enrolled.

Update Customer Information

Select the **Edit Customer** option to advance to the *Edit Customer (Sold-To) Information* panel.

> **Note:**
>
> This option is available only if you have authority to the **Enter/Maintain Orders (OEOM)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option and for a user class in the **Work with User Classes (WUCL)** menu option.

Call the Customer’s Phone Number

Select the *Phone Number* link to advance to the default application used to initiate phone calls. If a default application is not defined, a window displays where you can select the application to use to call the customer’s phone number.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Phone** field in the **Work with Contact Center (WWCC)** menu option. In addition, the **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Email the Customer

Select the *Email Address* link to advance to the default application used for email. If a default application is not defined, a window displays where you can select the application to use to email the customer.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Email** field in the **Work with Contact Center (WWCC)** menu option.

Review Frequently Purchased Items

Click **Frequent Purchases** in the **Purchases** customer summary tile to open the *Frequently Purchased Items Panel*.

Review Registries or Create a Registry Order

Click **Registries** in the **Purchases** customer summary tile to open the Registries panel. This option is available only if the ORCE Customer Integration is enabled, there is a record for the customer in Customer Engagement, and the *Use ORCE Registries (M26)* system control value is selected

If the customer has more than one registry: Select a registry to display the fields and options for that registry. You can select **Return to Registries** at the top of the panel to return to the Registries panel, displaying all registries for the customer.

Registries are displayed here only if they have been published in Customer Engagement, and the current customer is the owner of the registry.

Registry options: When a single registry order is displayed:

- **Filter the items on the registry:** Enter a full or partial item code or description to restrict the displayed registry items.
- **Create a registry order:** Select **Create Registry Order** to advance to the Customer Information (Order Entry Step 2) step in order entry and create an order for the customer that includes one or more items in the registry. Note that the options in order entry are different when you are creating a registry order.

Available when? This option is available only if the displayed registry includes at least one item that is available to sell in Order Administration (that is, not a Store only item). See *Order Entry* for additional required system control values and other settings. The **Create Registry Order** option is also not available if you currently have order entry open in another tab, regardless of whether the order is for the currently displayed customer.

When would you create a registry order? You might create a registry order if:

- A customer wants to purchase items on their own wish list. For example, a customer might create a wish list for items needed for the first semester at college.
- A customer wants to purchase items remaining on a registry after the event occurs. For example, after a baby shower, the customer might want to purchase additional remaining items that were not given as gifts at the shower.

Sort Listed Memberships

You can sort on any column in the **Memberships** table by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Memberships first display in the **Memberships List** table in membership program description order.

Column Sort by Activity

Activity sorts by:

- Membership
- Status
- Next Release
- Last Order
- Recipient
- Active Shipping Address

Filter Displayed Memberships

The page provides an entry field below the **Memberships List** panel with the message **Type to filter**. You can further refine the memberships displayed in the Membership Table by entering one or more search terms found in any of the fields displayed in that table.

Example: Enter `Washington`. The displayed results include orders for recipients whose names are "Washington," as well as customers whose addresses include "Washington" in the street address or city. Next, enter `George`. Displayed results are now further restricted to orders that include "George" in any of the fields displayed in the Membership Table, provided the orders also include "Washington."

Matching records need to contain the search term, but do not need to start with the search term. For example, both `123.45` and `23.45` are matches for a search term of `23`.

Filtering is across all results: The filtering is not restricted to the memberships displayed on the first page of results. For example, if the only membership matching your entry is on the third page of results, this membership is displayed.

Additional information on filtering:

- Only fields displayed at the Membership Table are available for filtering. For example, you can filter based on the membership status, next release, or recipient, because this information displayed, but you cannot filter based on an item on the order.
- You can enter membership status, such as Complete, to filter the results to include only completed orders.
- You can enter a membership activity, such as Next Release, to include only those memberships that have had that activity.
- You cannot filter by:
  - The description of the membership type.
  - The recipient customer's company name, even though it is displayed.

- Filtering is not case-sensitive. For example, you can enter `complete` or `COMPLETE` to display complete memberships.
- To filter based on last order date, include the date delimiters. For example, enter 8/27 rather than 827 to filter for a last order date of August 27.

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.

Replace Payment Method

The payment for an *Active* customer membership can be replaced.

> **Note:**
>
> If a membership is in a status of Canceled, Complete or In Process, or does not have a pay type associated to it, the **Replace Payment Method** option is NOT enabled.
>
> If the user's menu option authority for **Enter/Maintain Orders (OEOM)** is set to DISPLAY or EXCLUDE, the **Replace Payment Method** option is NOT enabled.

Select **Replace Payment Method** from the **Actions** menu (⋮) for the membership to open the Replace Payment window. The Replace Payment options vary for the customer membership depending on the replacement payment method chosen:

Cash, Checks Replacement Payment

1. Select cash/check payment method from the *Payment Method* drop down box. The system identifies a payment as cash/check if its *Pay Category* in the *Work with Pay Types (WPAY)* menu option is set to **Cash/Check**. After you select a cash/check payment, the system displays additional fields required to create a cash/check payment.
2. Enter an *Amount to Charge*.
3. Select **OK** to replace the payment method for the membership. The system validates your entries. If the payment passes validation, the system displays a *Snackbar Notification* indicating the payment was added to the membership.

Credit Card or Debit Card Replacement Payment

Credit card and Debit cards are handled through Oracle Retail EFTConnect. Oracle Retail EFTConnect facilitates integration with account providers, such as CyberSource and Adyen, external payment services (EPS), and other custom Oracle Payment Interface (OPI) payment services. Use of EFTConnect removes any requirement to configure each credit card payment type in Order Administration; instead, the payment processor that hosts the payment form validates the card, including the card number length, format, leading digits, or expiration date.

When a customer membership is purchased, the cardToken and customerToken captured on the payment in the original/parent order is stored with the Customer Membership (WWCM) record. When the child membership order is generated (EGMO), it stores those same tokens with the Order Payment Method.

1. Select a credit or debit card payment from the *Payment Method* drop down box.
2. Select **OK** to display the additional fields related to this payment method. The fields shown are those returned from the payment provider such as CyberSource, Adyen, EPS, or OPI, hence field names and display could be different.
3. Enter a *Card Number*.
4. Enter the *Expiry Month* (MM format) and *Expiry Year* (YY format).
5. Select **Pay** to replace the payment method for the membership. An error message indicates if any of the entered fields are invalid. The system displays a *Snackbar Notification* indicating the payment was added to the membership.

   When a card is replaced on a customer membership for a credit or debit card, the system obtains a $0 (zero)authorization to get a card token to store for future authorizations.

   If an authorization response is declined when replacing a payment, the declined payment is not added to the customer membership.

If an error occurs whilst loading the service or after selecting **Pay**, and the payment provider form cannot be displayed, retry or select a new form of payment. You can close the window, select Edit, or select the hyperlink in the message.

- If the window is closed, payment is not added and the membership list page is displayed.
- Selecting Edit allows you to retry or change the payment method.
- Selecting the hyperlink in the error message tries to reload the form.

Gift Card (Stored Value Card) Replacement Payment

1. Select a gift card payment from the *Payment Method* drop down box.
2. Select **OK** to display the additional fields related to this payment method.
3. Enter a *Card Number*. The system validates the card number against the credit card length, leading digits, and modulus check settings defined for the payment method in the **Work with Pay Types (WPAY)** menu option.
4. Enter a *Start Date* in MM/YY format. Displayed only if the **Require Start Date** field is selected for the payment method.
5. Enter an *Expiration Date* in MM/YY format. Required only if the **Require Expiration Date** field is selected for the payment method.
6. Enter a *Card ID Number* if one is defined for the gift card.
7. Select **Pay** to replace the payment method for the membership. An error message indicates if any of the entered fields are invalid. If the payment passes validation, the system displays a *Snackbar Notification* indicating the payment was added to the membership.

> **Note:**
>
> Pay type records that have a **Card Type** of **Wallet** as viewed in the Classic View **Work with Payment Types** (WPAY) are excluded from the list of replacement payment methods.
>
> Any pay type associated to the PPL authorization service (WASV) is also excluded.

Edit Expiration Date

The expiration date for a payment card on a customer membership can be updated.

> **Note:**
>
> If a membership is in a status of Canceled, Complete or In Process, or does not have a pay type associated to it, the **Edit Expiration Date** option is NOT enabled.

1. Select **Edit Expiration Date** from the **Actions** menu (⋮) to change the expiration date of the payment card for the selected customer membership.
2. Enter a new expiration date and select **OK**. If a valid date is entered, the updated expiration date is saved for the customer membership. If an invalid date is entered, an error is displayed: Invalid Expiration Date.

> **Note:**
>
> Existing customer membership orders are not updated with the new expiration date.

If using EFTConnect authorization service, a failure may occur if the customer token value provided by the payment service provider in the authorization response is not included when the order was submitted.

Review Items Sold to or Returned by the Customer

Select the **Purchase History** tab to advance to the *Customer Purchase History List*, where you can review order information sent from Customer Engagement. This tab is available only if the *ORCE Customer Integration (L37)* system control value is set to INTERACT.

Review or Work with Loyalty Cards, Programs, or Awards for the Customer

Select the Loyalty option to switch to the *Customer Loyalty List* for the customer.

Return to the Order List Results

Select the **Orders** tab to return to the *Customer Order List*.

Fields on Customer Membership List

Purpose: The following information displays on the **Customer Memberships List** page.

- *Customer Memberships List Tab Fields*
- *Customer Memberships List Page Title Fields*
- *Customer Information Panel Fields*

- *Customer Summary Tiles Fields*
- *Frequently Purchased Items Panel Fields*
- *Registries Panel Fields*
- *Membership Table Fields*

For more information:

- *Customer Memberships List* for an overview of the **Customer Memberships List** page.
- *Customer Membership List Options* for step-by-step instructions on the actions you can perform on the **Customer Memberships List** page.

Customer Memberships List Tab Fields

The customer recipient's name displays in the page tab for the **Customer Memberships List** page. If the customer record does not have a last name but there is a company name, the first ten positions of the company name displays as the tab title.

Customer Memberships List Page Title Fields

The title and the tab of the **Customer Memberships List** page contains the following:

- If a customer last name exists, the title of the page displays the customer's name in first name, last name display.
- If a no name exists for the customer record but there is a company name, the title of the page displays the customer's company name.
- If the customer record does not have either a last name or a company, just the customer number is displayed.
- The *Customer Number* is in parentheses. When the Purchase History tab is available, this is the Oracle Retail Customer Engagement ID.
- The *Customer Since* date follows the customer name and number. When the Purchase History tab is available, this is the sign up date from Oracle Retail Customer Engagement (ORCE).

Customer Information Panel Fields

The customer information panel below the page title displays the following fields:

- On the left-hand side:
  - *Customer Name* or *Company Name*. If the customer record has just a first name, no name is displayed.
  - The *Customer Number* is in parentheses following the customer name. When the Purchase History tab is available, this is the Customer Engagement ID.
  - The Loyalty Member icon and label (Loyalty Member), indicating that the customer is currently enrolled in one or more loyalty programs. See Customer Loyalty List for more information.
  - *Customer Since* date. When the Purchase History tab is available, this is the signup date from Oracle Retail Customer Engagement.
  - *Customer Class* (displayed only if the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is selected, regardless of whether a customer class is assigned to the customer)

- On the right-hand side:
  - *Customer Name*, including *Prefix* and *Suffix*, if specified, and or *Company Name*, followed by *Customer Address*
    - If a customer name and company name are defined, the company name displays below the customer name.
    - If a company name is defined without a sold-to customer name, the company name displays in place of the sold-to customer name.
  - *Phone Number* (unlabeled field below the **Customer Address**): The **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option. If more than one phone number is defined for the customer, the system uses the following hierarchy to display the phone number:
    - day time phone number
    - mobile phone number
    - evening phone number
  - *Email Address* (unlabeled field below the **Phone Number**): This field displays only if an email address is defined for the customer.
  - *Opt-In Status* (unlabeled field below the **Email Address**): This field displays only if an email address is defined for the customer.

Customer Summary Tiles Fields

Tiles to the right of the customer information panel provide the following information:

- Purchases (*Total Orders*). This tile includes a link to the *Frequently Purchased Items Panel*.
- *Lifetime Value*. The default *Currency Code* is indicated below this total.
- Return Rate (*Item Return Rate*)

Frequently Purchased Items Panel Fields

The **Frequently Purchased Items** *Panel* displays up to five items in the customer's purchase history that appear in the greatest number of orders, regardless of the ship-to customer on the order or the status of the order line.

The system does not consider the quantity of the item purchased. For example:

- If a customer purchased item A1234 in black, red, and blue and sent 1 of each to 3 different ship-tos, the frequency in which the customer purchased that item is 1.
- If that customer placed a different order for item A1234 in yellow and black, 1 each, the frequency would change to 2.

If the item has SKUs, the base item is displayed and the totals include all SKUs.

Items display in this panel in most frequently purchased, most recent order date, ascending item ID sequence. The following is displayed for each item:

- *Item Image*: Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no item or SKU image has been defined.

> **Note:**
>
> The icon indicating that an *Item Information Link* is available is not displayed on the item image in the Frequently Purchased Items panel.

- *Item Description*
- *Item ID* (next to the item description, in parentheses)
- Total Orders: This is the total number of orders for the customer that include the item, across ship-tos.
- *Last Ordered Date*

Registries Panel Fields

If there is a single registry for the customer:

- Registry header information:
  - Registry name: The Name defined for the registry in Customer Engagement.
  - Customer name: The name of the customer, in Last name, First name order.
  - Registry type: The type of registry defined in Customer Engagement. Possible types are Gift Registry and Wish List.
  - Event type: The event type defined for a registry in Customer Engagement, such as Birthday Party or Wedding Shower. Not displayed for a Wish List.
  - Venue: The name of the venue, if any, specified in Customer Engagement for the registry. Not displayed for a Wish List.
  - Date: The Event Date defined in for the registry in Customer Engagement. Not displayed for a Wish List.
- Item information: Includes the item description for the item in Order Administration, followed by the item number or code and SKU, in parentheses.

  The Item Image and Item Information Link are also available, if they have been defined and are enabled.

  Store-only item: If there is no record of the item in Order Administration, the description is Store only item. You cannot add a store-only item to an order.
- Quantity desired: The requested quantity of the item defined for the registry in Customer Engagement.
- Quantity purchased: The quantity of the item that has already been purchased, either through Order Administration or another system integrating with Customer Engagement. The quantity displayed does not increase when you add the item to the current registry order; it increases after you submit the order. This quantity is not updated when the customer purchases the item on a non-registry order.

If there is more than one registry for the customer:

- Number of registries for the customer, such as 2 Registries Found.
- Registry information: The Name defined for the registry in Customer Engagement, and the venue for a gift registry.
- Date: The Event Date defined in for the registry in Customer Engagement. Not displayed for a Wish List.

- Registry type: Gift Registry or Wish List.

See *Review Registries or Create a Registry Order* for more information on options.

Membership Table Fields

The **Memberships** table displays all standard membership records for a customer. All memberships appear in the list and the page scrolls. The results have a default sort based on membership description. This table does not show loyalty memberships. See *Customer Memberships List* for information on customer memberships. For each customer membership record, the system displays the following fields.

- *Membership Program*
- *Status*
  The following customer membership badges are available:
  - *Active*
  - *Canceled*
  - *Complete*
  - *In Process*
  - *Inactive*
  - *Error*
- Next Release: Displays the date that the next membership order will be generated.

  > **Note:**
  >
  > The system calculates this date based on the schedule defined for the membership. You can change the next release date in classic view by selecting **Change release date/rotation** for a customer membership in Work with Customer Memberships (WWCM).

  The next release date is not displayed for customer memberships with the following status:
  - Canceled
  - Complete
  - Inactive
- Last Order: Displays the date the last order was generated for the customer membership.

  > **Note:**
  >
  > This can be viewed in the classic view in Work with Customer Memberships (WWCM).

- *Recipient*
  The recipient is displayed as follows:
  - <last name, first name>

  - If last name and company name, <last name, first name> with <company name> below in the same cell
  - If no last name, <company name>

> **Note:**
>
> View the recipient in classic view in Work with Customer Memberships (WWCM), Display, Recipient.

- Active Shipping Address: A shipping address to send the order to.
- **Actions** menu (⋮) containing *Replace Payment Method* and *Edit Expiration Date* options.

> **Note:**
>
> - If a membership is in a status of Canceled, Complete or In Process, the *Replace Payment Method* option is NOT enabled.
> - If a membership is in a status of Canceled, Complete or In Process, the *Edit Expiration Date* option is NOT enabled.

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Customer Purchase History List

Overview: Use the **Purchase History** tab at the *Customer Order List* page to review the items sold to the customer or returned by the customer. This information is provided by Customer Engagement, and the **Purchase History** tab is available only if the *ORCE Customer Integration (L37)* system control value is set to INTERACT.

How to display: Select the **Purchase History** option on the *Customer Order List* page.

For more information:

- *Customer Purchase History List Options* for step-by-step instructions on the actions you can perform at the **Customer Purchase History List** page.
- *Fields on Customer Purchase History List* for a description of the fields on the **Customer Purchase History List** page.

Customer Purchase History List Options

Purpose: You can perform the following actions at the *Customer Purchase History List* page.

- *Create Order*
- *Use the Prompt to Join Loyalty*
- *Update Customer Information*
- *Call the Customer's Phone Number*
- *Email the Customer*
- *Review Frequently Purchased Items*
- *Review Registries or Create a Registry Order*
- *Sort Listed Items*
- *Filter Displayed Items*
- *Display Item Information*
- *Select an Order for Review*
- *Review or Work with Loyalty Cards, Programs, or Awards for the Customer*
- *Return to the Order List Results*

For more information:

- *Customer Purchase History List* for an overview of the *Customer Purchase History List* page.
- *Fields on Customer Purchase History List* for a description of the fields on the *Customer Purchase History List* page.

Create Order

Select the **Create Order** option to advance to the *Enter or Verify Customer Information* step in *Order Entry*.

> **Note:**
>
> This option is available only if you have authority to the **Contact Center Order Entry (CCOE)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option and for a user class in the **Work with User Classes (WUCL)** menu option.

Use the Prompt to Join Loyalty

Loyalty prompt options: A prompt to join loyalty is displayed below the customer's name and customer number, providing the following options:

- **Never:** Do not ask the customer again about joining loyalty. In this case, Order Administration sends a Customer Engagement Update Customer Request to update the ORCE_LOYALTY_PROMPT_ATTRIBUTE setting for the customer to FALSE so that Order Administration will not prompt the customer again to join the Loyalty program.
- **Not Now:** The customer is not joining loyalty now, but can be prompted again in the future. Order Administration does not send an update to Customer Engagement.
- **Enroll:** Enroll the customer in loyalty. See Updates at Loyalty Enrollment for information on the updates that take place when the customer enrolls.

Displayed when? The prompts are displayed only if:

- the *ORCE Customer Integration (L37)* system control value is set to INTERACT, and
- the *Use ORCE Loyalty (M06)* and *Prompt to Join Loyalty (M07)* system control values are selected, and
- the customer has an ORCE customer ID and is not already a loyalty member, and has not previously requested to stop prompting for loyalty membership, such as by selecting the **Never** option at the prompt.

Prompt wording: The ORCE_LOYALTY_REG_MESSAGE property (PROP) defines the wording of the prompt message.

You can also enroll the customer in loyalty through the process described under Enroll the Customer in a Loyalty Program if the customer is not already enrolled.

Update Customer Information

Select the **Edit Customer** option to advance to the *Edit Customer (Sold-To) Information* panel.

> **Note:**
>
> This option is available only if you have authority to the **Enter/Maintain Orders (OEOM)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option and for a user class in the **Work with User Classes (WUCL)** menu option.

Call the Customer's Phone Number

Select the *Phone Number* link to advance to the default application used to initiate phone calls. If a default application is not defined, a window displays where you can select the application to use to call the customer's phone number.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Phone** field in the **Work with Contact Center (WWCC)** menu option. In addition, the **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Email the Customer

Select the *Email Address* link to advance to the default application used for email. If a default application is not defined, a window displays where you can select the application to use to email the customer.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Email** field in the **Work with Contact Center (WWCC)** menu option.

Review Frequently Purchased Items

Click **Frequent Purchases** in the **Purchases** customer summary tile to open the *Frequently Purchased Items Panel*.

Review Registries or Create a Registry Order

Click **Registries** in the **Purchases** customer summary tile to open the Registries panel. This option is available only if the ORCE Customer Integration is enabled, there is a record for the customer in Customer Engagement, and the *Use ORCE Registries (M26)* system control value is selected

If the customer has more than one registry: Select a registry to display the fields and options for that registry. You can select **Return to Registries** at the top of the panel to return to the Registries panel, displaying all registries for the customer.

Registries are displayed here only if they have been published in Customer Engagement, and the current customer is the owner of the registry.

Registry options: When a single registry order is displayed:

- **Filter the items on the registry:** Enter a full or partial item code or description to restrict the displayed registry items.
- **Create a registry order:** Select **Create Registry Order** to advance to the Customer Information (Order Entry Step 2) step in order entry and create an order for the customer that includes one or more items in the registry. Note that the options in order entry are different when you are creating a registry order.

Available when? This option is available only if the displayed registry includes at least one item that is available to sell in Order Administration (that is, not a Store only item). See Order Entry for additional required system control values and other settings. The **Create Registry Order** option is also not available if you currently have order entry open in another tab, regardless of whether the order is for the currently displayed customer.

When would you create a registry order? You might create a registry order if:

- A customer wants to purchase items on their own wish list. For example, a customer might create a wish list for items needed for the first semester at college.
- A customer wants to purchase items remaining on a registry after the event occurs. For example, after a baby shower, the customer might want to purchase additional remaining items that were not given as gifts at the shower.

Sort Listed Items

You can sort on any column in the **Items** table by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Filter Displayed Items

The page provides an entry field below the **Items** panel with the message **Filter results**. You can further refine the orders displayed in the *Items Table* by entering one or more search terms found in any of the fields displayed in that table.

Example: Enter `PEN`. The displayed results include order lines for items whose descriptions include “pen,” as well as any items that include “pen” in the item code. Next, enter `held`. Displayed results are now further restricted to order lines that are in Held status, provided the order lines also include “pen.”

Matching records need to contain the search term, but do not need to start with the search term. For example, both `123.45` and `23.45` are matches for a search term of `23`.

Filtering is across all results: The filtering is not restricted to the order lines displayed on the first page of results. For example, if the only order line matching your entry is on the third page of results, this order line is displayed.

Additional information on filtering:

- Only fields displayed at the *Items Table* are available for filtering. For example, you can filter based on the order line status, unit price, or purchase status, because this information displayed, but you cannot filter based an order total or special handling instructions.
- Filtering is not case-sensitive. For example, you can enter `closed` or `CLOSED` to display closed order lines.

- To filter based on order date, include the date delimiters. For example, enter 8/27 rather than 827 to filter for an order date of August 27.
- You can filter based on numeric fields to display partial matches. For example, if the unit price is 11.95, you can enter 11 or 95 to include the order in the search results.

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.

Display Item Information

Click a displayed item to open the *Item Information Link* for the item. The item code is a link only if item information has been defined for the item. Note that the item information icon is not displayed.

Select an Order for Review

In the *Items Table*, select an *Order Number* link to advance to the *Order Summary* page for the order.

> **Note:**
>
> A link is not available if the order's status is **Error** or **Suspended**.

Review or Work with Loyalty Cards, Programs, or Awards for the Customer

Select the Loyalty option to switch to the *Customer Loyalty List* for the customer.

Return to the Order List Results

Select the **Orders** tab to return to the *Customer Purchase History List*.

Fields on Customer Purchase History List

Purpose: The following information displays on the **Customer Items List** page.

- *Customer Purchase List Tab Fields*
- *Customer Items List Page Title Fields*
- *Customer Information Panel Fields*
- *Customer Summary Tiles Fields*
- *Frequently Purchased Items Panel Fields*
- *Registries Panel Fields*
- *Lifetime to Date Totals Fields*
- *Year to Date Totals Fields*
- *Purchase History Details Table Fields*

For more information:

- *Customer Purchase History List* for an overview of the **Customer Purchase History List** page.

- *Customer Purchase History List Options* for step-by-step instructions on the actions you can perform on the **Customer Purchase History List** page.

Customer Purchase History List Tab Fields

The customer's name displays in the page tab for the **Customer Purchase History List** page. If the customer record does not have a last name but there is a company name, the first ten positions of the company name displays as the tab title. If the customer record does not have either a last name or a company, the tab is blank.

Customer Purchase History List Page Title Fields

The title and the tab of the **Customer Items List** page contains the following:

- If a customer last name exists, the title of the page displays the customer's name in first name, last name display.
- If a no name exists for the customer record but there is a company name, the title of the page displays the customer's company name.
- If the customer record does not have either a last name or a company, just the customer number is displayed.
- The *Customer Number* is in parentheses. When the Purchase History tab is available, this is the Customer Engagement ID.
- The *Customer Since* date follows the customer name and number. When the Purchase History tab is available, this is the signup date from Oracle Retail Customer Engagement.

Customer Information Panel Fields

The customer information panel below the page title displays the following fields:

- On the left-hand side:
  - *Customer Name* or *Company Name*. If the customer record has just a first name, no name is displayed.
  - The *Customer Number* is in parentheses following the customer name. When the Purchase History tab is available, this is the Customer Engagement ID.
  - The Loyalty Member icon and label (Loyalty Member), indicating that the customer is currently enrolled in one or more loyalty programs. See Customer Loyalty List for more information.
  - *Customer Since* date. When the Purchase History tab is available, this is the signup date from Oracle Retail Customer Engagement.
  - *Customer Class* (displayed only if the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is selected, regardless of whether a customer class is assigned to the customer)
- On the right-hand side:
  - *Customer Name*, including *Prefix* and *Suffix*, if specified, and or *Company Name*, followed by *Customer Address*
    - If a customer name and company name are defined, the company name displays below the customer name.
    - If a company name is defined without a sold-to customer name, the company name displays in place of the sold-to customer name.

- *Phone Number* (unlabeled field below the **Customer Address**): The **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option. If more than one phone number is defined for the customer, the system uses the following hierarchy to display the phone number:
  - day time phone number
  - mobile phone number
  - evening phone number
- *Email Address* (unlabeled field below the **Phone Number**): This field displays only if an email address is defined for the customer.
- *Opt-In Status* (unlabeled field below the **Email Address**): This field displays only if an email address is defined for the customer.

Customer Summary Tiles Fields

Tiles to the right of the customer information panel provide the following information:

- Purchases (*Total Orders*). This tile includes a link to the *Frequently Purchased Items Panel*..
- *Lifetime Value*. The default *Currency Code* is indicated below this total.
- Return Rate (*Item Return Rate*)

Frequently Purchased Items Panel Fields

The **Frequently Purchased Items Panel** displays up to five items in the customer's purchase history that appear in the greatest number of orders, regardless of the ship-to customer on the order or the status of the order line.

The system does not consider the quantity of the item purchased. For example:

- If a customer purchased item A1234 in black, red, and blue and sent 1 of each to 3 different ship-tos, the frequency in which the customer purchased that item is 1.
- If that customer placed a different order for item A1234 in yellow and black, 1 each, the frequency would change to 2.

If the item has SKUs, the base item is displayed and the totals include all SKUs.

Items display in this panel in most frequently purchased, most recent order date, ascending item ID sequence. The following is displayed for each item:

- *Item Image*: Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no item or SKU image has been defined.

> **Note:**
>
> The icon indicating that an *Item Information Link* is available is not displayed on the item image in the Frequently Purchased Items panel.

- *Item Description*
- *Item ID* (next to the item description, in parentheses)

- Total Orders: This is the total number of orders for the customer that include the item, across ship-tos.
- *Last Ordered Date*

Registries Panel Fields

If there is a single registry for the customer:

- Registry header information:
  - Registry name: The Name defined for the registry in Customer Engagement.
  - Customer name: The name of the customer, in Last name, First name order.
  - Registry type: The type of registry defined in Customer Engagement. Possible types are Gift Registry and Wish List.
  - Event type: The event type defined for a registry in Customer Engagement, such as Birthday Party or Wedding Shower. Not displayed for a Wish List.
  - Venue: The name of the venue, if any, specified in Customer Engagement for the registry. Not displayed for a Wish List.
  - Date: The Event Date defined in for the registry in Customer Engagement. Not displayed for a Wish List.
- Item information: Includes the item description for the item in Order Administration, followed by the item number or code and SKU, in parentheses.

  The Item Image and Item Information Link are also available, if they have been defined and are enabled.

  Store-only item: If there is no record of the item in Order Administration, the description is Store only item. You cannot add a store-only item to an order.
- Quantity desired: The requested quantity of the item defined for the registry in Customer Engagement.
- Quantity purchased: The quantity of the item that has already been purchased, either through Order Administration or another system integrating with Customer Engagement. The quantity displayed does not increase when you add the item to the current registry order; it increases after you submit the order. This quantity is not updated when the customer purchases the item on a non-registry order.

If there is more than one registry for the customer:

- Number of registries for the customer, such as 2 Registries Found.
- Registry information: The Name defined for the registry in Customer Engagement, and the venue for a gift registry.
- Date: The Event Date defined in for the registry in Customer Engagement. Not displayed for a Wish List.
- Registry type: Gift Registry or Wish List.

See *Review Registries or Create a Registry Order* for more information on options.

Lifetime to Date Totals Fields

Currency code: From the Base System Currency defined in Customer Engagement. In parentheses next to the Lifetime to Date title.

The following totals are calculated in Customer Engagement based on the Transaction History records for the customer.

Sales:

- The total Extended Price of all items sold to the customer to date.
- Number of items: The total number of items sold to the customer to date.

Returns:

- The total Extended Price of all items returned by the customer to date.
- Number of items: The total number of items returned by the customer to date.

Net:

- The total Extended Price minus the total price of Returned Items to date.
- The total Number of Items minus the number of Returned items to date.

Year to Date Totals Fields

Currency code: From the Base System Currency defined in Customer Engagement. In parentheses next to the Year to Date title.

The following totals are calculated in Customer Engagement based on the Transaction History records for the customer.

Sales:

- The total Extended Price of all items sold to the customer year to date.
- Number of items: The total number of items sold to the customer year to date.

Returns:

- The total Extended Price of all items returned by the customer year to date.
- Number of items: The total number of items returned by the customer year to date.

Net:

- The total Extended Price minus the total price of Returned Items year to date.
- The total Number of Items minus the number of Returned items year to date.

Purchase History Details Table Fields

The Purchase History Details table displays all items that the customer has purchased or returned. This information is from the Transaction History records in Customer Engagement. For each customer purchase history record, the system displays the following fields.

> **Note:**
>
> The Items table does not include items on open or canceled order lines.

- Purchase Date: The date when the item was shipped or sold, or when it was returned.
- Item/SKU: The item/SKU code from Order Administration, if any; otherwise, the item/SKU code passed from Customer Engagement is displayed.

- Description: The item or SKU code from Order Administration, if any; otherwise, the description is Store Only Product (AB1234), where AB1234 is the item/SKU code passed from Customer Engagement.
- Quantity: The quantity of the item that was shipped or sold, or the quantity that was returned. The quantity is negative for a return.
- Extended Price: The quantity of the item that was shipped or sold, or the quantity that was returned, times the single-unit price, as passed from Customer Engagement. When the entry is for a return, the extended price is a negative number.

  If the order uses a different currency, Customer Engagement passes the currency and the exchange rate used, so that the extended price displayed is converted into the default currency using the information passed by Customer Engagement; however, the foreign currency is not indicated next to the Extended Price.
- Channel: Possible channels are:
  - Call Center: Indicates that the store ID passed from Customer Engagement matches the *Default Location for ORCE Integration (K69)* system control value and the response from Customer Engagement specifies a channel of CATALOG.
  - Web: Indicates that the store ID passed from Customer Engagement matches the *Default Location for ORCE Integration (K69)* system control value and the response from Customer Engagement specifies a channel of ECOMM.
  - Store: Indicates that the store ID does not match the criteria for displaying a channel of Call Center Web. Displayed as Store - A1234, where A1234 is the store code.
- Transaction ID: The number identifying the sale or return in Customer Engagement. When the order exists in Order Administration, this is the invoice number.
- Order: The Order Administration order number, if any. Note:
  - The order number is blank if the order did not originate in Order Administration and was not fulfilled through Order Administration. For example, the order number is blank if the order originated in Xstore and was fulfilled through Order Orchestration, and not assigned to Order Administration for fulfilling.
  - An order line might be listed twice for the same order if the order originated in Order Administration, was submitted to Order Orchestration for fulfilling location assignment, and then was assigned to Order Administration, creating a fulfilling order for the originating order.
  - If the order number is indicated, it is a link to the *Order Summary* page.
- Transaction Type: Set to **Sale** if the item was shipped or sold; otherwise, set to **Return**.

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Customer Loyalty List

Overview: Use the **Loyalty** tab at the *Customer Order List* page to review or work with loyalty programs for the customer, or to enroll the customer in a loyalty program.

How to display: Select the **Loyalty** option on the *Customer Order List* page.

For more information:

- *Customer Loyalty Options* for step-by-step instructions on the actions you can perform at the **Customer Loyalty List** page.
- *Fields on Customer Loyalty List* for a description of the fields on the **Customer Loyalty List** page.

Customer Loyalty List Options

Purpose: You can perform the following actions at the Customer Loyalty List page.

- *Create Order*
- *Use the Prompt to Join Loyalty*
- *Update Customer Information*
- *Call the Customer's Phone Number*
- *Email the Customer*
- *Review Frequently Purchased Items*
- *Review Registries or Create a Registry Order*
- *Enroll the Customer in a Loyalty Program*
- *Issue Points*
- *Issue Award Coupon*
- *Sort Listed Programs*
- *Select a Program to Review Account Details*
- *Review Orders for the Customer*
- *Review Items Sold to or Returned by the Customer*
- *Review Items Purchased by the Customer*

For more information:

- *Customer Loyalty List* for an overview of the *Customer Loyalty List* page.
- *Fields on Customer Loyalty List* for a description of the fields on the *Customer Loyalty List* page.

Create Order

Select the **Create Order** option to advance to the *Enter or Verify Customer Information* step in *Order Entry*.

> **Note:**
>
> This option is available only if you have authority to the **Contact Center Order Entry (CCOE)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option and for a user class in the **Work with User Classes (WUCL)** menu option.

Use the Prompt to Join Loyalty

Loyalty prompt options: A prompt to join loyalty is displayed below the customer's name and customer number, providing the following options:

- **Never:** Do not ask the customer again about joining loyalty. In this case, Order Administration sends a Customer Engagement Update Customer Request to update the ORCE_LOYALTY_PROMPT_ATTRIBUTE setting for the customer to FALSE so that Order Administration will not prompt the customer again to join the Loyalty program.
- **Not Now:** The customer is not joining loyalty now, but can be prompted again in the future. Order Administration does not send an update to Customer Engagement.
- **Enroll:** Enroll the customer in loyalty. See Updates at Loyalty Enrollment for information on the updates that take place when the customer enrolls.

Displayed when? The prompts are displayed only if:

- the *ORCE Customer Integration (L37)* system control value is set to INTERACT, and
- the *Use ORCE Loyalty (M06)* and *Prompt to Join Loyalty (M07)* system control values are selected, and
- the customer has an ORCE customer ID and is not already a loyalty member, and has not previously requested to stop prompting for loyalty membership, such as by selecting the **Never** option at the prompt.

Prompt wording: The ORCE_LOYALTY_REG_MESSAGE property (PROP) defines the wording of the prompt message.

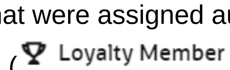
You can also enroll the customer in loyalty through the process described under *Enroll the Customer in a Loyalty Program* if the customer is not already enrolled.

Updates at Loyalty Enrollment

When you confirm the enrollment of the customer in loyalty:

- Order Administration sends a Customer Engagement Loyalty Generate Card Request to Customer Engagement.
- Customer Engagement uses the information in the Loyalty Generate Card Request to associate and activate a new loyalty card for the customer.

- Customer Engagement returns the Customer Engagement Loyalty Generate Card Response to Order Administration, containing the customer's loyalty card number.
- Order Administration:
  - generates the Loyalty Registration Notification email to send to the customer. This email contains the loyalty card number assigned to the customer; see *Oracle Retail Customer Engagement Loyalty Registration Notifications* in the Classic View online help for the setup required to generate the notice, and see *Oracle Retail Customer Engagement Loyalty Registration Notification Sample and Contents* for a sample email.
  - creates a record in the Customer Note table indicating a Customer Engagement Loyalty Registration Notice has been sent to the customer: Loyalty Reg Notice to acustomer@EXAMPLE.com. You can review customer notes on the Edit Customer Notes Screen. The note is written even if the system generates the Outbound Email XML Message (CWEmailOut) rather than an actual email, or if the email cannot be relayed if, for example, there is a problem with the destination email address.
  - sends a Customer Engagement Update Customer Request to update the ORCE_LOYALTY_PROMPT_ATTRIBUTE setting for the customer to FALSE so that Order Administration will not prompt the customer again to join the Loyalty program.
- Customer Engagement returns the Update Customer Response indicating whether the update was successful.
- Order Administration sends a Customer Engagement Loyalty Card Request to Customer Engagement, requesting the details of the loyalty card.
- Customer Engagement returns the details of the loyalty card in the Customer Engagement Loyalty Card Response.

Order Administration uses the information in the Loyalty Card Response to display the loyalty card number and its associated points and awards on the Customer Loyalty page, including any awards that were assigned automatically through enrollment. Also, the Loyalty Member icon and label (

) are displayed.

If communication fails:

- If a connection could not be made to Customer Engagement in order to enroll the customer in the loyalty program, the system displays an error message similar to the following: No response from ORCE-card not generated.
- If the value in the *ORCE Loyalty Card Prefix (M08)* or *ORCE Loyalty Card Series Sequence Number (M09)* system control value is not valid in Customer Engagement, the system displays an error message similar to the following: No response from ORCE-card not generated.

Update Customer Information

Select the **Edit Customer** option to advance to the *Edit Customer (Sold-To) Information* panel.

> **Note:**
>
> This option is available only if you have authority to the **Enter/Maintain Orders (OEOM)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option and for a user class in the **Work with User Classes (WUCL)** menu option.

Call the Customer's Phone Number

Select the *Phone Number* link to advance to the default application used to initiate phone calls. If a default application is not defined, a window displays where you can select the application to use to call the customer's phone number.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Phone** field in the **Work with Contact Center (WWCC)** menu option. In addition, the **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Email the Customer

Select the *Email Address* link to advance to the default application used for email. If a default application is not defined, a window displays where you can select the application to use to email the customer.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Email** field in the **Work with Contact Center (WWCC)** menu option.

Review Frequently Purchased Items

Click **Frequent Purchases** in the **Purchases** customer summary tile to open the *Frequently Purchased Items Panel*.

Review Registries or Create a Registry Order

Click **Registries** in the **Purchases** customer summary tile to open the Registries panel. This option is available only if the ORCE Customer Integration is enabled, there is a record for the customer in Customer Engagement, and the *Use ORCE Registries (M26)* system control value is selected

If the customer has more than one registry: Select a registry to display the fields and options for that registry. You can select **Return to Registries** at the top of the panel to return to the Registries panel, displaying all registries for the customer.

Registries are displayed here only if they have been published in Customer Engagement, and the current customer is the owner of the registry.

Registry options: When a single registry order is displayed:

- **Filter the items on the registry:** Enter a full or partial item code or description to restrict the displayed registry items.
- **Create a registry order:** Select **Create Registry Order** to advance to the *Customer Information (Order Entry Step 2)* step in order entry and create an order for the customer that includes one or more items in the registry. Note that the options in order entry are different when you are creating a registry order.

Available when? This option is available only if the displayed registry includes at least one item that is available to sell in Order Administration (that is, not a Store only item). See *Order Entry* for additional required system control values and other settings. The **Create Registry Order** option is also not available if you currently have order entry open in another tab, regardless of whether the order is for the currently displayed customer.

When would you create a registry order? You might create a registry order if:

- A customer wants to purchase items on their own wish list. For example, a customer might create a wish list for items needed for the first semester at college.
- A customer wants to purchase items remaining on a registry after the event occurs. For example, after a baby shower, the customer might want to purchase additional remaining items that were not given as gifts at the shower.

Enroll the Customer in a Loyalty Program

Click the plus sign next to **Enroll in Loyalty** and then select OK at the Confirm Enrollment window. This option is available only if:

- the *ORCE Customer Integration (L37)* system control value is set to INTERACT, and
- the *Use ORCE Loyalty (M06)* system control value is selected, and
- the customer is not already a loyalty member.

For more information: See *Updates at Loyalty Enrollment*.

Issue Points

In the Account Details panel for a loyalty program, select **Issue Points** to open the **Issue Loyalty Points** window, where you can issue new points for the loyalty program. This option is displayed only if you have the required authority under the *ORCE Issue Awards/Points (J07)* secured feature.

The *Points Amount* and the *Reason* are required. Note that the *Points Amount* must be a whole number and can be a negative amount; however, you cannot issue a negative number of points that would cause the points balance for the account to be negative, unless the points will be created in escrow (indicated by the *Pending* flag).

When you complete this window, the request to issue the points is submitted to Customer Engagement, where the points are added to the customer's account. The Issue Points activity is immediately displayed under Account Activity.

See *Issue Loyalty Points Window Fields* for details on fields.

Issue Award Coupon

In the Account Details panel for an award program, select **Issue Award Coupon** to open the **Issue Award Coupon** window, where you can issue a new award amount. This option is displayed only if you have the required authority under the *ORCE Issue Awards/Points (J07)* secured feature.

The *Award Amount* and the *Reason* are required, while the *Expiration Date* is optional. Note that the *Points Amount* can include a two-position decimal, and cannot be a negative amount.

When you complete this window, the request to issue the coupon is submitted to Customer Engagement, where the award is added to the customer's account. The Issue Coupon activity is immediately displayed under Account Activity.

> **Note:**
>
> An error indicates if the currency code defined in the *Local Currency Code (A55)* system control value is invalid. This system control value must be set to a valid currency code.

See *Issue Award Coupon Window Fields* for details on fields.

Sort Listed Programs

If the customer is enrolled in any loyalty programs, you can sort on any column below a card by clicking on the column name. Both loyalty and award programs are listed. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Select a Program to Review Account Details

If the customer is enrolled in any loyalty programs, select the Program Name link for a program to open the Account Details panel.

> **Note:**
>
> Activity from the last 30 days is displayed in the Account Details panel, provided the number of activity records (excluding inquiries, which are not displayed) does not exceed the Account Activity Lookup Limit setting defined in Customer Engagement. If the total number of records on the account exceeds this lookup limit, an error is displayed.

You can sort the records displayed in the Account Details panel by clicking any of the column headings.

Review Orders for the Customer

Select the Orders tab to return to the *Customer Order List*.

Review Items Sold to or Returned by the Customer

Select the Purchase History tab to advance to the *Customer Purchase History List*, where you can review items that the customer has purchased or returned. This information is from the Transaction History records in Customer Engagement. This tab is available only if the *ORCE Customer Integration (L37)* system control value is set to INTERACT.

Review Items Purchased by the Customer

Select the Items option to switch to the *Customer Items List* for the customer.

Fields on Customer Loyalty List

Purpose: The following information displays on the **Customer Loyalty List** page.

- *Customer Loyalty List Tab Fields*
- *Customer Loyalty List Page Title Fields*
- *Customer Information Panel Fields*
- *Customer Summary Tiles Fields*
- *Frequently Purchased Items Panel Fields*
- *Registries Panel Fields*
- *Cards and Programs Table Fields*
- *Account Details Fields*
- *Issue Loyalty Points Window Fields*
- *Issue Award Coupon Window Fields*

For more information:

- *Customer Loyalty List* for an overview of the **Customer Loyalty List** page.
- *Customer Loyalty List Options* for step-by-step instructions on the actions you can perform on the **Customer Loyalty List** page.

Customer Loyalty List Tab Fields

The customer's name displays in the page tab for the **Customer Loyalty List** page. If the customer record does not have a last name but there is a company name, the first ten positions of the company name displays as the tab title. If the customer record does not have either a last name or a company, the tab is blank.

Customer Loyalty List Page Title Fields

The title and the tab of the **Customer Loyalty List** page contains the following:

- If a customer last name exists, the title of the page displays the customer's name in first name, last name display.
- If a no name exists for the customer record but there is a company name, the title of the page displays the customer's company name.
- If the customer record does not have either a last name or a company, just the customer number is displayed.
- The *Customer Number* is in parentheses. When the Purchase History tab is available, this is the Customer Engagement ID.
- The *Customer Since* date follows the customer name and number. When the Purchase History tab is available, this is the signup date from Oracle Retail Customer Engagement.

Customer Information Panel Fields

The customer information panel below the page title displays the following fields:

- On the left-hand side:
  - *Customer Name* or *Company Name*. If the customer record has just a first name, no name is displayed.
  - The *Customer Number* is in parentheses following the customer name.
  - *Customer Since* date.
  - The Loyalty Member icon and label (Loyalty Member), indicating that the customer is currently enrolled in one or more loyalty programs. See *Customer Loyalty List* for more information.
  - *Customer Class* (displayed only if the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is selected, regardless of whether a customer class is assigned to the customer)
- On the right-hand side:
  - *Customer Name*, including *Prefix* and *Suffix*, if specified, and or *Company Name*, followed by *Customer Address*
    - If a customer name and company name are defined, the company name displays below the customer name.
    - If a company name is defined without a sold-to customer name, the company name displays in place of the sold-to customer name.
  - *Phone Number* (unlabeled field below the **Customer Address**): The **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option. If more than one phone number is defined for the customer, the system uses the following hierarchy to display the phone number:
    - day time phone number
    - mobile phone number
    - evening phone number
  - *Email Address* (unlabeled field below the **Phone Number**): This field displays only if an email address is defined for the customer.
  - *Opt-In Status* (unlabeled field below the **Email Address**): This field displays only if an email address is defined for the customer.

Customer Summary Tiles Fields

Tiles to the right of the customer information panel provide the following information:

- Purchases (*Total Orders*). This tile includes a link to the *Frequently Purchased Items Panel*..
- *Lifetime Value*. The default *Currency Code* is indicated below this total.
- Return Rate (*Item Return Rate*)

Frequently Purchased Items Panel Fields

The **Frequently Purchased Items Panel** displays up to five items in the customer's purchase history that appear in the greatest number of orders, regardless of the ship-to customer on the order or the status of the order line.

The system does not consider the quantity of the item purchased. For example:

- If a customer purchased item A1234 in black, red, and blue and sent 1 of each to 3 different ship-tos, the frequency in which the customer purchased that item is 1.
- If that customer placed a different order for item A1234 in yellow and black, 1 each, the frequency would change to 2.

If the item has SKUs, the base item is displayed and the totals include all SKUs.

Items display in this panel in most frequently purchased, most recent order date, ascending item ID sequence. The following is displayed for each item:

- *Item Image*: Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no item or SKU image has been defined.

> **Note:**
>
> The icon indicating that an *Item Information Link* is available is not displayed on the item image in the Frequently Purchased Items panel.

- *Item Description*
- *Item ID* (next to the item description, in parentheses)
- Total Orders: This is the total number of orders for the customer that include the item, across ship-tos.
- *Last Ordered Date*

Registries Panel Fields

If there is a single registry for the customer:

- Registry header information:
  - *Registry name:* The Name defined for the registry in Customer Engagement.
  - *Customer name:* The name of the customer, in Last name, First name order.
  - *Registry type:* The type of registry defined in Customer Engagement. Possible types are Gift Registry and Wish List.
  - *Event type:* The event type defined for a registry in Customer Engagement, such as Birthday Party or Wedding Shower. Not displayed for a Wish List.
  - *Venue:* The name of the venue, if any, specified in Customer Engagement for the registry. Not displayed for a Wish List.
  - *Date:* The Event Date defined in for the registry in Customer Engagement. Not displayed for a Wish List.

- *Item information:* Includes the item description for the item in Order Administration, followed by the item number or code and SKU, in parentheses.

  The *Item Image* and *Item Information Link* are also available, if they have been defined and are enabled.

  Store-only item: If there is no record of the item in Order Administration, the description is Store only item. You cannot add a store-only item to an order.
- *Quantity desired:* The requested quantity of the item defined for the registry in Customer Engagement.
- *Quantity purchased:* The quantity of the item that has already been purchased, either through Order Administration or another system integrating with Customer Engagement. The quantity displayed does not increase when you add the item to the current registry order; it increases after you submit the order. This quantity is not updated when the customer purchases the item on a non-registry order.

If there is more than one registry for the customer:

- Number of registries for the customer, such as 2 Registries Found.
- *Registry information:* The Name defined for the registry in Customer Engagement, and the venue for a gift registry.
- *Date:* The Event Date defined in for the registry in Customer Engagement. Not displayed for a Wish List.
- *Registry type:* Gift Registry or Wish List.

See Review Registries or Create a Registry Order for more information on options.

Cards and Programs Table Fields

The Enroll in Loyalty option is displayed if:

- the *ORCE Customer Integration (L37)* system control value is set to INTERACT, and
- the *Use ORCE Loyalty (M06)* system control value is selected, and
- the customer is not already a loyalty member.

If the customer is enrolled in one or more card programs, the Cards table displays the description of each card program and the card number for each, as well as the programs and awards for each card. If there are multiple cards, they are listed in alphabetical order.

The information displayed is returned from Customer Engagement.

- Card Description: The description of the card from Customer Engagement. From the Description passed in the retrieveCustomer response message.
- Card Number: The card number assigned to the customer in Customer Engagement. From *cardNumber* in the retrieveCustomer response message.
- For each program for the card, the following information is from the getCardInquiryData response message.
  - Program Description: The description of the program. From the instrument description in the getCardInquiryData response message, This is a link to open the Account Details panel, described below.
  - Program Type: Either Loyalty or Award.

- Account Number: The account number for the loyalty or award program.
- Level: The name identifying the level, as defined in Customer Engagement.
- Balance: The current balance of the loyalty or award program. This is the total current earned points balance for the customer loyalty account.
  - For a loyalty program, this is the number of points, and is typically a whole number, although Customer Engagement can return a point amount that includes a decimal.
  - For an award program, this is a monetary value, including a two-position decimal. The currency code is indicated.

Account Details Fields

The Account Details panel lists the following information that is provided by Customer Engagement. Details are listed in reverse chronological order (newest to oldest). You can sort the displayed records by clicking the column headings.

Loyalty Program fields: The following information is from the getCardInquiryData response and the getLoyaltyHistory response.

- Program Description: The description of the loyalty program.
- Program Type: Loyalty.
- Account Number: Identifies the customer's loyalty program account.
- Level: The name identifying the level, as defined in Customer Engagement.
- Loyalty Points:
  - Balance: The current unused points for the loyalty program. Does not include pending points.
  - YTD: The total year-to-date points for the program. Does not include pending points.
  - LTD: The total life-to-date points for the program. Does not include pending points.
- Account Activity: Activity from the last 180 days is displayed, provided the number of activity records (excluding inquiries, which are not displayed) does not exceed the Account Activity Lookup Limit setting defined in Customer Engagement. If the total number of records on the account exceeds this lookup limit, an error is displayed. Records are sorted in descending chronological order (newest to oldest). This information is from the getLoyaltyHistory response message from Customer Engagement.
  - Date: The date and time when the activity occurred.
  - Activity Type: The type of activity performed. Inquiry activity records are not listed. Possible activity types:
    - Account Merge
    - Activated
    - Change Earn Date
    - Change Level
    - Deactivated
    - Earn Balance Transfer
    - Earn Points
    - Expire Points

        * Issue Award
        * Issue Points
        * Points Recovery
        * Return Points
        * Reset Expiration Date
        * Sustain Extension
        * Transfer In
        * Transfer Out
        * Void Points

> **Note:**
>
> Inquiry Activity is not displayed.

- Activity ID: The activity transaction ID assigned to the transaction in Customer Engagement. You can use this value as a reference for voiding a transaction in Customer Engagement or when writing a customer or order note.
- Pending: Set to Yes if the points are pending being issued; otherwise this field is blank. Depending on the configuration of the program in Customer Engagement, points might be held in escrow for a set period of time before they are eligible to be released.
- Location: The code identifying the location where the activity was performed.
- Value: The number of points represented by the activity:
    - Typically a positive number when the activity is Issue Points, Deactivated, Points Recovery, Earn Points, Transfer In, or Points Balance Transfer.
    - Typically a negative number when the activity is Return Points, Issue Award, Void Points, Expire Points, Transfer Out, or Change Level.
    - Typically set to 0.00 or blank when the activity did not affect the points total, such as Account Merge, Change Earn Date, Reset Expiration Date, or Sustain Extension.

Awards Program fields: The following information is from the getCardInquiryData response and the getAwardAccountHistory response:

- Program: The description of the awards program.
- Account Number: Identifies the customer's awards program account.
- Balance: The total value of the listed coupons after subtracting any redemptions. The currency code is indicated.
- Account Activity:
    - Date and Time when the activity took place.
    - Activity Type. Possible activity types include:
        * Account Merge: Accounts for the customer were merged.
        * Activate: The award activity program was created for the customer.
        * Automatic Redeem: The award was applied toward an order.

    * Deactivate
    * Expire Coupon: The coupon has been expired.
    * Issue Birthday Coupon
    * Issue Coupon: A coupon was issued, either automatically or manually.
    * Issue Entitlement Coupon
    * Issue Promo Award Coupon
    * Issue Signup Coupon
    * Notify Coupon Expire
    * Redeem
    * Reset Expiration Date: The expiration date for a coupon was reset.
    * Transfer In: An award was transferred from a different awards acocunt.
    * Transfer Out: An award was transferred to a different awards account.
    * Void Award.

> **Note:**
>
> Inquiry activity is not displayed.

- Activity ID: The activity transaction ID assigned to the transaction in Customer Engagement. You can use this value as a reference for voiding a transaction in Customer Engagement or when writing a customer or order note.
- Value: The amount of the award activity. Positive for activities that increase the awards total, such as issues and transfers in. Negative for activities that decrease the awards total, such as redemptions, transfers out, and expirations. Set to 0.00 for activations. Includes a two-position decimal. Blank when the expiration date is reset or when accounts are merged.
- Expiration: The date when the awarded coupon expires, if any. Blank for an Activate activity, Account Merge, or for a Reset Expiration Date activity. Set to No Expiration if no date was specified for an Issue Coupon.
- Coupon ID: Identifies the coupon issued, transferred in, transferred out, expired, or redeemed through the activity; otherwise, blank.
- Location: The code identifying the location where the activity was performed. Blank for a Transfer In or a Transfer Out.

Issue Loyalty Points Window Fields

- Program Name: The name of the loyalty program. Display-only.
- Account Number: The number identifying the customer's loyalty account. Display-only.
- Points Amount: The amount of points to issue. Required. Must be a whole number of up to 7 positions. Can be a negative amount; however, you cannot issue a negative number of points that would cause the points balance for the account to be negative, unless the points will be created in escrow (indicated by the *Pending* flag).
- Reason: Enter a description of the reason why you are issuing the points. Up to 1000 positions. Once entered, the reason is not displayed in Order Administration. Required.

Issue Award Coupon Window Fields

- Program Name: The name of the awards program. Display-only.
- Account Number: The number identifying the customer’s awards account. Display-only.
- Award Amount: The amount of the award to issue. Up to 7 positions, including a two-place decimal. Cannot be a negative amount. Required.
- Expiration Date: The date when the award should expire. If you enter a date, it must be later than the current date. If you do not enter a date, the expiration rules defined for the program apply. Optional.
- Reason: Enter a description of the reason why you are issuing the award. Up to 1000 positions. Once entered, the reason is not displayed in Order Administration. Required.

> **Note:**
>
> An error occurs if the *Local Currency Code (A55)* system control value is not set to a valid currency.

19 Edit Customer (Sold-To) Information

Overview: Use the **Edit Customer (Sold-To) Information** panel to review and update a sold-to customer's name, address, and preferences.

The system updates the sold-to customer record automatically when you change any customer address information, including the customer name, company name, street address, postal code, city, state/province, country, phone number, or email. The system also revises the sold-to customer's match code based on the changes to the name and address.

Customer Engagement Customer Integration: When you use the Customer Engagement customer integration, the customer information displayed is updated automatically based on the current information in Customer Engagement. Also, when you use the Customer Engagement customer integration, if you update the customer's name or address information, Order Administration sends an update to Customer Engagement so that the customer records in the two systems are synchronized.

> **Note:**
>
> - If you delete address lines 2-4 or apartment, these address lines are also deleted in Customer Engagement.
> - Deleting the customer's prefix, middle initial, suffix, company name, and primary email address does not delete the corresponding fields in Customer Engagement; as a result, the next time that the customer information is synchronized from Customer Engagement, this information is restored. For example, customer information is synchronized from Customer Engagement when you select the customer from a search page.
> - Deleting the customer's prefix, first name, middle initial, suffix, last name or business name, address lines 2-4, apartment, phone number extensions, or email address in Customer Engagement deletes the corresponding fields in Order Administration.

The Customer Engagement customer integration is in use only if the *ORCE Customer Integration (L37)* system control value is set to **INTERACT**.

Outbound Customer API: You can generate a customer download XML message when you update a customer. See the **Generic Customer Download API** in the Classic View help for more information.

How to display:

- Select the **Edit** option on the *Customer Order List* page or *Customer Items List* page. The **Edit** option is available only if you have authority to the **Enter/Maintain Orders (OEOM)** menu option.
- Select the **Edit** option on the *Order Summary* page. The **Edit** option is available only if the order is not currently locked by another user, session, or by the system and you have authority to the **Enter/Maintain Orders (OEOM)** menu option and the *Order Maintenance*

Access (A22) secured feature. In addition, the order cannot be a store pickup order, based on the *Broker Delivery Type*.

> **Note:**
>
> When you advance to this panel, the system locks the customer, preventing any other user in Contact Center from updating the customer. In addition, if you advance to this panel from the **Order Summary** page, the system locks the order.

Panel title: If you advance to this panel from the *Customer Order List* page or *Customer Items List* page, the title of the page is **Edit Customer Information**. If you advance to this page from the *Order Summary* page, the title of the page is **Edit Sold-To**.

For more information:

- *Edit Customer (Sold-To) Information Options* for step-by-step instructions on the actions you can perform on the **Edit Customer (Sold-To) Information** panel.
- *Fields on Edit Customer Information* for a description of the fields on the **Edit Customer (Sold-To) Information** panel.

Edit Customer (Sold-To) Information Options

Purpose: You can perform the following actions on the **Edit Customer (Sold-To) Information** panel.

- *Update Customer Name (First, Middle, Last)*
- *Update Company Name*
- *Update Customer Address*
- *Update Email Address and Opt-In Status*
- *Update Phone Number*
- *Update Mail and Rent Preferences*
- *Update Customer Class*

For more information:

- *Edit Customer (Sold-To) Information* for an overview of the **Edit Customer (Sold-To) Information** panel.
- *Fields on Edit Customer Information* for a description of the fields on the **Edit Customer (Sold-To) Information** panel.

Converted to uppercase: Information that you enter in upper and lower case at the **Edit Customer (Sold-To) Information** panel, including name and address, is converted to all uppercase.

Customer Engagement customer integration: When you use the Customer Engagement customer integration, if you update the customer's name or address information, Order Administration sends an update to Customer Engagement so that the customer records in the two systems are synchronized.

Note:

- If you delete address lines 2-4 or apartment, these address lines are also deleted in Customer Engagement.
- Deleting the customer's prefix, middle initial, suffix, company name, and primary email address does not delete the corresponding fields in Customer Engagement; as a result, the next time that the customer information is synchronized from Customer Engagement, this information is restored. For example, customer information is synchronized from Customer Engagement when you select the customer from a search page.
- Deleting the customer's prefix, first name, middle initial, suffix, last name or business name, address lines 2-4, apartment, phone number extensions, or email address in Customer Engagement deletes the corresponding fields in Order Administration.

The Customer Engagement customer integration is in use only if the *ORCE Customer Integration (L37)* system control value is set to INTERACT.

Update Customer Name (First, Middle, Last)

1. Update the *Prefix*, *First Name*, *Middle Initial*, *Last Name*, or *Suffix*.
2. Select **Update**. The system validates your entries. An error message displays if the **Last Name** is blank and a *Company Name* is not defined.
3. If the update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved.

Note:

When updating the sold-to name and address on an order, if the name and address of a ship-to customer on the order matched the sold-to name and address, the system also updates the ship-to name and address with the sold-to customer changes.

Update Company Name

1. Update the *Company Name*.
2. Select **Update**. The system validates your entry. An error message displays if the **Company Name** is blank and a *Last Name* is not defined.
3. If the update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved.

Note:

When updating the sold-to name and address on an order, if the name and address of a ship-to customer on the order matched the sold-to name and address, the system also updates the ship-to name and address with the sold-to customer changes.

Update Customer Address

1. Update the following fields:

   - *Street Address* (**Lines 1-4**): Address line 1 is required. To ship to a Post Office Box, enter `POST OFFICE BOX`, `POST BOX`, or any variation of `PO BOX` (with or without spaces or non-alphabet characters, such as `P.O. BOX`), and the box number in the **Street Address Line 1**. **Example:** Enter `P.O. Box 9999` in **Street Address Line 1** to indicate delivery to a post office box instead of a home or company address. **Note:** You still need to select the **PO box** field in the **Work with Customers (WCST)** menu option.
   - *Apartment/Suite*. To enter an apartment or suite address, type `APT` to indicate an apartment or `STE` to indicate a suite, insert a space, and type the number of the apartment or suite. **Example:** `APT 4` or `STE 116`. Addresses must conform to United States Parcel Service (USPS) address formatting field description standards. For example, always precede the apartment or suite number with the appropriate abbreviation, such as APT or STE).
   - *Country* **Code:** Required. Select a valid country code from the drop-down list. For orders that are in error at the header in a batch, displays invalid values passed in orders and allows you to select a valid value and update the order.
   - *Postal Code*:
     - The **Postal Code** is required if the **Require postal code?** flag is selected for the country in the **Work with Countries (WCTY)** menu option. If a postal code is required for the country, the system validates the postal code against the SCF table. You can create and work with SCF codes in the **Work with SCF Codes (WSCF)** menu option.
     - If the *Use Zip/City/State Defaulting? (B13)* system control value is selected, you can enter just the postal code to have the system default the associated city and state if these fields are blank.
   - *City*: The **City** is required if the *Use Zip/City/State Defaulting? (B13)* system control value is unselected.
   - *State/Province* **Code:** The system displays the valid state/province codes defined for the selected country code. For orders that are in error at the header in a batch, displays invalid values passed in orders and allows you to select a valid value and update the order.
   - The **State/Province Code** is required if the **Require state?** flag is selected for the country.

     The system validates the state/province code against the State table. The system also validates that the state/province code you enter is assigned to the SCF for the postal code. You can create and work with SCF codes in the **Work with SCF Codes (WSCF)** menu option.

> **Note:**
>
> When you enter a partial state or province, matching results are displayed in alphabetical order based on the full state or province name that contains your entry, rather than those that start with your entry. For example, if you enter MA for Massachusetts, Alabama is displayed first because it contains your entry.

2. Select **Update**. The system validates your entries. An error message displays if:
   - Address line 1 is blank.
   - A country code is not defined.
   - A postal code is not defined and the **Require postal code?** flag is selected for the country in the **Work with Countries (WCTY)** menu option.
   - The postal code is not valid in the **Work with SCF Codes (WSCF)** menu option.
   - A city is not defined and the *Use Zip/City/State Defaulting? (B13)* system control value is unselected.
   - A state/province code is not defined and the **Require state?** flag is selected for the country.
   - The state/province code is not valid in the **Work with SCF Codes (WSCF)** menu option.
   - The system is also updating the ship-to address on the order and items on the order are restricted from being shipped to the state or country of the address you entered. In this situation, you must change the address to a location that is eligible to ship all of the items on the order.
3. If the update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved.

> **Note:**
>
> When updating the sold-to name and address on an order, if the name and address of a ship-to customer on the order matched the sold-to name and address, the system also updates the ship-to name and address with the sold-to customer changes.

Update Email Address and Opt-In Status

1. Update the following fields:
   - *Email Address*
   - *Opt-In Status*: Select a valid opt-in status from the drop-down list. This opt-in status applies to the email address defined.
2. Select **Update**. The system validates your entries. An error message displays if the email address is not formatted correctly. The system validates that:
   - There is an @ sign and a period (.).
   - There is some text before the @ sign, between the @ sign and the period, and after the period.

Example: The system would not let you create an email address such as `@example.com`, `sbrown@example`, `sbrown@.org`, or `www.example.com`.

3. If the update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved.
   - If you overwrite the existing email address in this field, the system flags your entry as the primary email address for the customer, but retains the previous email address in the Customer Sold To Email table. You must use the **Work with Customer Email Address** screen in **Work with Customers (WCST)** to delete the previous email address from this table.
   - If the email address was updated and a primary email address did not exist for the sold-to customer, the system flags the new email address as the customer's primary email address.
   - If the email address was updated and a primary email address existed for the sold-to customer, the system flags the new email address as the customer's primary email address and saves the original email address as a non-primary email address.
   - If the email address was removed, the system removes the primary email flag for the address but retains the address in the Customer Sold To Email table. You must use the **Work with Customer Email Address** screen in **Work with Customers (WCST)** to delete the previous email address from this table.
   - When updating the sold-to name and address on an order, if the name and address of a ship-to customer on the order matched the sold-to name and address, the system also updates the ship-to name and address with the sold-to customer changes.

Update Phone Number

Multiple *Phone Numbers* such as home, business and mobile (or fax) for the customer sold-to, can be added, edited, deleted and displayed within Edit Customer (Sold-To) Information. The *Home Phone Number* field is always displayed, even when not populated.

Add a Phone Number: Click **+ Add Phone**. The **+ Add Phone** hyperlink displays only if less than three phone numbers are displayed.

- If there are no assigned phone numbers, select a phone number type, Business (supports an extension), or Mobile (or Fax number dependent on *Third Phone Number Type (L53)* system control value) and select OK. Enter the phone number in the phone type field. Only one phone number can be added per phone number type.
- If there is only a single phone type not yet assigned, the remaining phone type field is added when **+ Add Phone** is selected. Enter the phone number.

Edit a Phone Number: Change the phone number directly in the phone number field.

Delete a Phone Number: Select the delete icon next to the assigned phone number to *remove* the value in the phone number field. When *Require Phone Number in OE/OM (H01)* system control value is selected, at least one phone number is required. When *Require Phone Number in OE/OM (H01)* system control value is not selected, the phone number is not required and all assigned phone numbers can be deleted.

All phone number changes, additions, edits, or deletions, are saved when selecting **Update.**.

1. The system validates your entry. An error message displays if the phone number contains a letter. While the phone number field is alphanumeric, Contact Center allows only numbers and characters in this field, and not letters. For example, you can enter `(508) 525-0100` but not `1800FLOWERS` in this field.
2. If the update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved.
   - If a phone number was not previously defined and you enter a new phone number, the system updates the customer's phone number.
   - If you overwrite the existing phone number in this field, the system updates the phone number based on the associated phone type. For example, if the phone number that displays on this panel is the customer's mobile phone number and you overwrite the number, the system updates the customer's mobile phone number.
   - If you delete the phone number, the system removes the phone number based on the associated phone type. For example, if the phone number that displays on this panel is the customer's mobile phone number and you remove the number, the system deletes the customer's mobile phone number.
   - When updating the sold-to name and address on an order, if the name and address of a ship-to customer on the order matched the sold-to name and address, the system also updates the ship-to name and address with the sold-to customer changes.

> **Note:**
>
> The **Phone Number** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Update Mail and Rent Preferences

1. Update the following fields:
   - **Mail** (*Receive Catalog Mailings*)
   - **Rent** (*Share Information with Other Companies*)
2. Select **Update**.
3. If the update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved.

Update Customer Class

1. Update the *Customer Class*.
   - The *Maintenance of Customer Class Field (B07)* secured feature defines whether you can enter or maintain the **Customer Class** field.
   - If the *Require Customer Class in OE, WCAT, and WCST (H85)* is selected and the customer does not have a customer class code assigned, the customer class defined in the *Default Customer Class in Order Entry (D63)* system control value defaults to the field.
2. Select **Update**. The system validates your entry. An error message displays if a customer class is not defined and the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is selected.

3. If the update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved.

> **Note:**
>
> The **Customer Class** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Fields on Edit Customer Information

Purpose: The following information displays on the **Edit Customer (Sold-To) Information** panel.

- *Customer Number*
- *Prefix*
- *First Name*
- *Middle Initial*
- *Last Name*
- *Suffix*
- *Company Name*
- *Street Address* (**Lines 1-4**)
- *Apartment/Suite*
- *Country* **Code**
- *Postal Code*
- *City*
- *State/Province* **Code**
- *Email Address*
- **Email** *Opt-In Status*
- *Phone Number*: When *Require Phone Number in OE/OM (H01)* system control value is selected, at least one phone number is required. When *Require Phone Number in OE/OM (H01)* system control value is not selected, the phone number is not required. This field displays only if it has been selected for display in the **Work with Contact Center (WWCC)** menu option.
- **Mail** (*Receive Catalog Mailings*)
- **Rent** (*Share Information with Other Companies*)
- *Customer Class*

For more information:

- *Edit Customer (Sold-To) Information* for an overview of the **Edit Customer (Sold-To) Information** panel.
- *Edit Customer (Sold-To) Information Options* for step-by-step instructions on the actions you can perform on the **Edit Customer (Sold-To) Information** panel.

20 Order Summary

Overview: Use the **Order Summary** page to review the contents of an order, including the customer (sold-to, ship-to(s), and bill-to), the activity performed against the order, the items purchased for each ship-to, payment information, and order totals.

The **Order Summary** page provides a one-page snapshot of an order for efficient order inquiry and allows you to answer questions about an order, such as:

- What is the status of the order?
- What is the status of an item on the order? Has the item shipped?
- Why is the order on hold?
- What was the reason for an exchange?
- What form of payment was used for an order?
- When is a backordered item expected to be available to ship?
- What was the most recent activity on the order?

How to display:

- Perform an order search on the *Search for Orders or Customers* page when only one order is found.
- Select the **Order Number** link for an order on the *Search for Orders or Customers* page.
- Select the **Order Number** link for an order on the *Customer Order List* page.
- Select the **Order Number** link for an order on the *Customer Items List* page.
- Select the **Order Number** link for an order on the *Manage Held Orders* page.

In this topic:

- *Maintaining an Order*

For more information:

- *Order Summary Options* for step-by-step instructions on the actions you can perform on the **Order Summary** page.
- *Fields on Order Summary* for a description of the fields on the **Order Summary** page.

Maintaining an Order

Purpose: Order maintenance allows you to update an order by:

- Changing customer, order, item, or payment information.
- Adding or updating a payment.
- Adding or updating an item.
- Adding, updating, or deleting personalization for an item.
- Canceling an item or order.

- Holding an order line or order.
- Releasing an order line or order from hold.
- Returning an order or line, exchanging a line, or creating a misship.

Any time you select to update the information on an order, the system locks the order so that it cannot be maintained by another user while you are making updates; see *Display of a Locked Order*.

After you maintain an order, the system:

- Recalculates the order totals and adjusts demand totals (number of orders) appropriately.
- Performs credit checking to place the maintained order on hold, if the maintenance results in some type of hold condition.
- Submits any newly eligible backordered lines to the Order Broker for fulfillment.
- Submits an update message to the Order Broker if you sell out or cancel an item on an order received from Order Orchestration.
- Captures the date, time, maintenance activity, and user ID in the Order Transaction History table to keep an on-line history of all order updates.
- Evaluates the order to determine if it qualifies for pick slip preparation.

Maintaining an Order with a PayPal Payment Method

If an order contains a PayPal payment method, you should not make any changes to the order that would increase the order total. When you generate a pick slip for an order that contains a PayPal payment, the system validates that the amount required to generate the pick slip does not exceed 115% or $75.00 of the original authorization amount that was received from PayPal during web storefront processing.

> **Note:**
>
> The system identifies a payment method as PayPal if **PPL** is defined as the authorization service and deposit service for the pay type in the Pay Type table. You can create and work with pay types in the **Work with Pay Types (WPAY)** menu option.

Maintaining Orders Received from Order Orchestration

If you have authority to the *Maintain Brokered Fulfillment Orders (B20)* secured feature, you can maintain an open or held order received from Order Orchestration.

You might need to maintain an order received from Order Orchestration to:

- Sell out an item that is no longer available: Order Administration sends a reject request to the Order Broker. The Order Broker then attempts to find another location to fulfill the order unless the order has already reached the Search retries maximum specified in Order Orchestration.
- Cancel an item that the customer no longer wants: Order Administration sends a cancel request to the Order Broker, indicating that the order should not be fulfilled. The Order Broker does not reassign a canceled order to another fulfilling location.

Caution: Certain updates are not appropriate for orders received from Order Orchestration, such as:

- changing payment information. When the system creates an order from Order Orchestration, it uses the *Order Broker Payment Type (K98)*. This is typically a "dummy" payment type if the order is fully paid in the originating retail location.
- changing the shipping address:
  - A pickup order ships to the originating store location, so you should update the shipping address only if the address for the originating store changes.
  - A delivery order ships to the customer. You should change the shipping address only after communicating with the originating location, so that the shipping address recorded for the order is consistent.

Returns: If the *Suppress Returns for Retail Pickup/Delivery (L88)* system control value is:

- Selected, you cannot process a return or misship against an order received from Order Orchestration or add a negative additional charge
- Unselected, you can process a return or misship against an order received from Order Orchestration; however, the *Order Broker Payment Type (K98)* is deactivated after shipment, so you would then need to enter a new payment method in order to process the related refund.

> **Note:**
>
> Regardless of the setting of the *Suppress Returns for Retail Pickup/Delivery (L88)* system control value, you cannot enter a line with a negative quantity or apply a discount against a shipped order line on an order received from Order Orchestration.

Prohibited updates: Other updates are not allowed, such as:

- Adding an item.
- Changing the ordered quantity.

Maintaining a Ship-for-Pickup Order

If the *Payment at POS for Ship for Pickup Orders (L60)* system control value is selected and you are maintaining a ship-for-pickup order, you cannot:

- Process a return or misship against an entire ship-for-pickup order or a line on a ship-for-pickup order.
- Enter a negative additional charge.
- Enter a line with a negative quantity.
- Apply a discount to a closed order line.

These restrictions apply regardless of whether the order type matches the *Order Type for Special Orders (L15)*.

Maintaining a ChannelAdvisor Order

If an order is processed through the ChannelAdvisor integration (the order's origin matches the *ChannelAdvisor Order Type (L90)*), any changes you make to the order are not sent to ChannelAdvisor.

Maintaining a Pay Type Hold Order

When all pay types are deactivated you won't be able to release the order from hold until a valid pay type is entered or the order is cancelled. You cannot unlock the order. You must enter a valid pay type to release the order from hold, or cancel the order. If you try to edit the order and a valid pay type is not entered, you should close the browser then use the Unlock Order (MULO) menu option to unlock the order.

Authority to Maintain an Order

In order to maintain (and lock) an order:

- You must have authority to the *Order Maintenance Access (A22)* secured feature, and
- You must have authority to the **Order Entry/Maintenance (OEOM)** menu option. You can define menu option authority for your user ID in the **Work with Users (WUSR)** menu option or for your user class in the **Work with User Classes (WUCL)** menu option.
- The order cannot be currently locked by another user, session, or by the system; see *When an Order is Locked by Another User or the System*.

In addition:

- If the order contains a printed quantity on any order line, you must have authority to the *Maintain Order with Printed Quantity (J05)* secured feature. **Note:** This secured feature does not apply to maintaining orders received from Order Orchestration or prevent you from canceling a store pickup order.
- If the order is from Order Orchestration, you must have authority to the *Maintain Brokered Fulfillment Orders (B20)* secured feature. **Note:** If you have authority, you can process a sellout or return, or add a payment method to an order from Order Orchestration. However, you cannot perform any other updates to an order from Order Orchestration regardless of your authority.
- If the order is a store pickup order, you must have authority to the *Cancel Order Broker Lines (B19)* secured feature in order to cancel a brokered backorder, an order received from Order Orchestration (pickup or delivery), store pickup, or ship-for-pickup order.

Display of a Locked Order

When you lock an order:

- A lock icon replaces the close icon in the page tab that displays the order,
- The Locked label is displayed in red,
- An **Unlock Order** option displays in the title banner for the order.

Once you have completed your updates, select **Unlock Order** or press CTRL + ALT + u to perform the final order updates and remove the lock from the order so that the order is available for maintenance by other users.

- If the order does not pass order accept validation, the system displays an error and the order remains locked. You must correct the error before you can unlock the order.
- If you close your browser while an order is locked, the order will remain locked. In this situation, you must use the **Unlock a Stranded Order or Batch (MULO)** menu option to unlock the order.

Display of an Unlocked Order

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When you unlock an order:

- The close icon (x) replaces the lock icon in the page tab that displays the order,
- The text in the title banner for the order changes from red to black,
- The **Unlock Order** option is removed from the title banner for the order.

You can close the window through the close icon, or by right-clicking the order number and selecting **Remove**.

When an Order is Locked by Another User or the System

If an order is locked by another user, session, or process, or because billing async transactions exist for the order that have not yet completed, the system displays a message at the top of the page indicating that the order is locked.

Example: If the order is locked by another user or by you in another session: `Order Locked for Editing (TBROWN)`, where `TBROWN` is the user ID of the user that has locked the order.

Example: If the order is locked by the system: `Order Locked for Editing (Billing In Process).`

In addition, update options are removed from the order so that you cannot update the order while it is being updated by another user or the system.

Closed store pickup order: A store pickup order that is fulfilled or canceled is also locked from updates. In this case, a message at the top of the Order Summary page indicates `Store pickup order cannot be maintained. Already shipped or canceled.`

Order Summary Options

Purpose: You can perform the following actions on the **Order Summary** page.

Sold-To Customer Actions:

- *Update Sold-To Customer Information*
- *Call the Sold-To Customer's Phone Number*
- *Email the Sold-To Customer using the Customer's Primary Email Address*

Order Header Actions:

- *Update Additional Order Details (Order Information)*
- *Email the Sold-To Customer using the Order Email Address*
- *Review Held Order Status Information*

Order Ship-To Actions:

- *Cancel a Ship-To Order*
- *Generate a Contact Us Email for the Order*
- *Update the Order Ship-To Address*
- *Call the Ship-To Customer's Phone Number*
- *Email the Ship-To Customer*
- *Update Ship-To Information*
- *Display Additional Ship-To Information*
- *Work with Additional Charges for a Ship-To Order*
- *Return an Order Ship To*
- *Create a Misship Return*
- *Review Tracking Information for the Order Ship-To*

Order Line Actions:

- *Add an Order Line*
- *Discount a Shipped, Unreturned Order Line*
- *Personalize the Item on an Order Line*
- *Edit, Remove, or Review Personalization for an Order Line*
- *Edit an Order Line*
- *Cancel an Order Line*
- *Sell Out an Order Line*
- *Add a Coordinate Item*
- *Review an Item's Personalization Details*
- *Review Drop Ship Information*
- *Review Brokered Information*
- *Review the Invoice Associated with a Shipped or Returned Order Line*
- *Review Tracking Information for a Shipment*
- *Check Inventory for an Item*
- *Review Item Information on the E-Commerce Web Site*
- *Review Order Line Activity*
- *Review an Order Line*
- *Return or Exchange an Order Line*
- *Hide or Show the Information about an Order Line*

Order Payment Method Actions:

- *Add a Payment to the Order*
- *Add a Manual Authorization*
- *Perform Balance Inquiry Against a Gift Card Payment*
- *Review Payment Method Details*
- *Update a Cash or Check Payment on the Order*
- *Authorize a Card Payment on the Order*
- *Deactivate a Payment on the Order*
- *Remove a Payment from the Order*

Order Actions:

- *Review or Work with Order Messages or Order Notes*
- *Perform a New Search*
- *Review Order Activity*
- *Review and Enter Order Notes and Other Customer Messages*
- *Review Refunds and Returns for the Order*
- *Review Invoices for the Order*
- *Unlock the Order*

For more information:

- *Order Summary* for an overview of the **Order Summary** page.
- *Fields on Order Summary* for a description of the fields on the **Order Summary** page.

If the Session Ends During Order Maintenance

A session can end while you are updating an order if, for example:

- The session times out due to inactivity.
- The browser closes unexpectedly.
- The user logs out.
- The user returns to Classic View.

The order is retained in error status if you have locked the order for maintenance, and:

- The session ends due to a timeout.
- The browser closes unexpectedly.
- You log out.

You can use the Purge Suspended Orders option (PSOR) in Classic View to purge orders that remain in error status, or use *Unlock Order* to unlock an order that remains locked.

> **Note:**
>
> ChannelAdvisor orders display a warning message when the Order Summary page is displayed in Modern View.

Update Sold-To Customer Information

In the *Sold-To Panel*, select the **Edit** option to lock the order and advance to the *Edit Customer (Sold-To) Information* page.

Note: This option is available only if:

- The order is not currently locked by another user, session, or by the system and you have authority to the **Enter/Maintain Orders (OEOM)** menu option and the *Order Maintenance Access (A22)* secured feature.
- The order is not a store pickup order, based on the *Broker Delivery Type*.

Call the Sold-To Customer's Phone Number

In the *Sold-To Panel*, select the *Phone Number* link to advance to the default application used to initiate phone calls. If a default application is not defined, a window displays where you can select the application to use to call the customer's phone number.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Phone** field in the **Work with Contact Center (WWCC)** menu option. In addition, the **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Email the Sold-To Customer using the Customer's Primary Email Address

In the *Sold-To Panel*, select the *Email Address* link to advance to the default application used for email. If a default application is not defined, a window displays where you can select the application to use to email the customer.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Email** field in the **Work with Contact Center (WWCC)** menu option.

Update Additional Order Details (Order Information)

In the *Additional Order Details Panel*, select the **Edit** option to lock the order and advance to the *Edit Additional Order Details* page.

Note: The **Edit** option is available only if:

- The order is not currently locked by another user or session or by the system,
- You have authority to the *Order Maintenance Access (A22)* secured feature,
- You have authority to the *Maintain Order with Printed Quantity (J05)* secured feature if there is a printed quantity on any order line,
- You have authority to the *Maintain Brokered Fulfillment Orders (B20)* secured feature if the order is from Order Orchestration (delivery or pickup),

- The *Broker Delivery Type* for the order is not **Store Pickup** or **Ship for Pickup**.

Email the Sold-To Customer using the Order Email Address

In the *Additional Order Details Panel*, select the *Order Email* link to advance to the default application used for email. If a default application is not defined, a window displays where you can select the application to use to email the customer.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Email** field in the **Work with Contact Center (WWCC)** menu option.

Review Held Order Status Information

In the *Additional Order Details Panel*, select the **Held** *Order Status* link to advance to the *Order Holds* window.

> **Note:**
>
> You must have authority to the **Release Held Orders (ERHO)**, **Enter/Maintain Orders (OEOM)**, and **Order Inquiry/Maintenance (OIOM)** menu options in order to advance to the **Order Holds** window.

Cancel a Ship-To Order

Above the *Ship-To Panel*, select the **Cancel** option to advance to the *Cancel Ship-To* window.

The **Cancel** option is available only if:

- The order is not currently locked by another user, the system, or another session, and
- The order is in an **Open** or **Held** status, and
- You have authority to the **Enter/Maintain Orders (OEOM)** menu option, and
- The order is not a quote.

In addition, if the order includes a brokered backorder line, is from Order Orchestration (delivery or pickup), or is a store pickup order, you must have authority to the *Cancel Order Broker Lines (B19)* secured feature.

Generate a Contact Us Email for the Order

The Contact Us email requests that the sold-to customer contact you about the order. Information in this email includes:

- The sold-to customer’s name.
- Message text from the contact us email template to print above system-generated information.
- Purchasing information, such as the order number, order date, sold-to name and address, ship-to name and address, and the sold-to customer number.
- Message text from the contact us email template to print below system-generated information.

To generate the email:

1. In the *Ship-To Panel*, select the **Send Contact Us** option to advance to the **Send Contact Us** window.
2. At the **Send Contact Us** window, the system displays the sold-to customer's email address; this is the email address that will receive the Contact Us email.
   - Select **Yes** to return to the **Order Summary** page and generate the Contact Us email.
   - Select **No, Do Not Send** to return to the **Order Summary** page without generating an email.
3. If you selected **Yes**, the system generates the Contact Us email and displays a message indicating the email has been sent.
   - If the **XML Only** flag for the Contact Us template is unselected, the system generates an actual email in HTML format.
   - If the **XML Only** flag for the Contact Us template is selected, the system generates an outbound email XML message (CWEmailOut), rather than an actual email. The XML message includes additional information that is not included in the standard email notice. You might choose to generate the XML message so that you can use the information to produce a reformatted HTML email for marketing purposes.

The **Send Contact Us** option is available only if:

- There is an email address for the sold-to customer, and
- The sold-to customer's opt-in/opt-out setting is **Email** or **Order Email Only**, and
- The *Contact Us Email Program (K54)* system control value specifies an email program. The default "contact us" email program is **CTUSNOTF**.

> **Note:**
>
> You can generate the Contact Us email regardless of the setting of the **Email notification** flag for the origin assigned to the order.

Update the Order Ship-To Address

In the *Ship-To Address Panel*, select the **Edit** option to lock the order and advance to the *Edit Order Ship-To Address* page.

This option does not display if the *Ship-To Status* is **Closed** or if the *Broker Delivery Type* for the order is **Store Pickup** or **Ship for Pickup**.

> **Note:**
>
> This option is available only if the order is not currently locked by another user and you have authority to the **Enter/Maintain Orders (OEOM)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option; you can define menu option authority for a user class in the **Work with User Classes (WUCL)** menu option.

Call the Ship-To Customer's Phone Number

In the *Ship-To Address Panel*, select the *Phone Number* link to advance to the default application used to initiate phone calls. If a default application is not defined, a window displays where you can select the application to use to call the customer's phone number.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Phone** field in the **Work with Contact Center (WWCC)** menu option. In addition, the **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Email the Ship-To Customer

In the *Ship-To Address Panel*, select the *Email Address* link to advance to the default application used for email. If a default application is not defined, a window displays where you can select the application to use to email the customer.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Email** field in the **Work with Contact Center (WWCC)** menu option.

Update Ship-To Information

In the *Ship-To Information Panel*, select the **Edit** option to lock the order and advance to the *Edit Ship-To Information* page.

Note: This option is not available:

- For store pickup orders or orders from Order Orchestration (delivery or pickup), based on the *Broker Delivery Type*.
- If the order ship-to status is closed.

If you create an address book in Order Entry (or Order API), and if you need to change it in Order Summary, the system uses the address book to create a one-time ship to address.

Display Additional Ship-To Information

Select Additional Information in the Ship-To panel to open the *Additional Information Panel*.

Work with Additional Charges for a Ship-To Order

Above the *Ship-To Information Panel*, select the **Additional Charges** option to advance to the *Additional Charges* panel.

Create a Misship Return

Above the *Ship-To Panel*, select the **Create Misship** option to lock the order and advance to the *Create Misship* page. This option is available only if there has been a shipment for the order.

Return an Order Ship To

Above the *Ship-To Panel*, select the **Return** option to lock the order and advance to the *Return Ship To* page. See the *Return Ship To* page for information on when this option is available.

Review Tracking Information for the Order Ship-To

In the *Ship-To Panel*, select **Shipment Tracking Details** to open the Shipment Tracking Details panel, displaying the tracking number and invoice number for each shipment made for the order ship-to.

Additional shipped item details: If the shipment was confirmed through the Pick In message, with carton details specified, in release 21.0 or later, the Shipment Tracking Details panel displays additional information about the shipped item(s), including the item name, description, shipped quantity, and the item image, if any.

The detail information is not displayed if:

- The shipment was confirmed through the Manual Confirmation (MCON) option, or
- The shipment was confirmed through the Pick In message, but no carton details were specified, or
- This is the originating order, rather than the fulfilling order, for a shipment processed through the Order Broker integration, or
- The shipment was confirmed in a release prior to 21.0.

In these cases, the information displayed includes the ship date, ship via description, tracking number, and invoice number. No detail information on the item(s) is displayed.

Fulfilling orders: If an order was submitted to Order Orchestration and then another order created as the fulfilling order, tracking information is available in the Shipment Tracking Details panel for the fulfilling order rather than for the originating order. However, you can review tracking information for the originating order at the *Order Activity* page.

For more information: See *Review Tracking Information for a Shipment* for background on how shipments are tracked and required setup. Also, see the Shipment Tracking Details panel for more information on the fields displayed in the Shipment Tracking Details panel.

Add an Order Line

Above the *Ship-To Panel*, select the **Add Item** option to lock the order and advance to the *Add Item* page.

In order to add an order line:

- The order cannot be currently locked by another user, the system, or another session.
- The order cannot be from Order Orchestration (delivery or pickup) or be a store pickup or ship for pickup order, based on the *Broker Delivery Type*.

Discount a Shipped, Unreturned Order Line

Select **Discount** from the actions menu (⋮) in the *Order Lines Panel* for a shipped order line to lock the order and advance to the *Discount Order Line* window.

> **Note:**
>
> - The **Discount** option is available only for unreturned order lines if:
>   - the order is not locked by a user and,
>   - you have authority to discount an order line, and
>   - the order is:
>   - in a closed status, or
>   - partially shipped, provided that there are no outstanding pick slips
> - The **Discount** option is not available for ship-for-pickup orders if the *Payment at POS for Ship for Pickup Orders (L60)* system control value is selected.
> - For set items, the **Discount** option displays for the main set item and not the set component items.
> - To ensure the background async jobs update order related tables correctly, do not use this option against a shipped, unreturned order line in the same session that you add a new order line.

Personalize the Item on an Order Line

Select **Personalize** from the actions menu (⋮) in the *Order Lines Panel* for an order line to lock the order and advance to the *Add Personalization* window.

The **Personalize** option is available for an order line only when the following are true:

- The order is not currently locked by another user, the system, or another session,
- The order line status is open or held, and the item does not have a printed or shipped quantity,
- The **Special Handling** flag for the item/offer or SKU/offer associated with the offer on the order line must be selected,
- The item does not already have personalization defined (see *Edit Personalization Information*).

To edit, remove, or review existing personalization applied to the order line, see below.

Edit, Remove, or Review Personalization for an Order Line

In the *Order Lines Panel*, select the *Personalization (Special Handling)* link under **Personalization** for an order line to lock the order and advance to the *Personalization Information* window. For example, if the additional charge code for monogramming is set to MO and the description of the additional charge code is MONOGRAMMING, the *Personalization (Special Handling)* link displays as MO - MONOGRAMMING.

> **Note:**
>
> You cannot open this window if the item's personalization uses a **S/H Code** with the **Suppress S/H Window** flag is set to **Suppress.**

Edit personalization: If the order line is open and unprinted, you can select the Edit option at the *Personalization Information* window to advance to the *Edit Personalization Information* window.

Remove personalization: If the order line is open or held and unprinted, you can select the Remove option at the *Personalization Information* window to remove the personalization from the order line.

Otherwise, your only option at the *Personalization Information* window is to review the personalization for the order line.

To add personalization to an order line, see *Personalize the Item on an Order Line*.

Edit an Order Line

In the *Order Lines Panel*, select the **Edit** option for an order line to lock the order and advance to the *Edit Order Line* page.

For set items, the **Edit** option displays for the main set item and not the set component items.

To edit an order line:

- The order cannot be currently locked by another user, the system, or another session,
- The order line status must be open or held and cannot have a printed quantity,
- The order line cannot be brokered,
- If the order line contains a set component item, you must have authority to the *Set Component Maintenance (J01)* secured feature,
- The order cannot be a store pickup based on the *Broker Delivery Type*.

Cancel an Order Line

Select **Cancel** from the actions menu (⋮) in the *Order Lines Panel* for an order line to lock the order and advance to the *Cancel Order Line* window.

The **Cancel** option is not available if:

- The order is currently locked by another user, the system, or another session.
- The order line is in a status other than open or held.
- The item on the order line has a printed pick slip; in this situation, you must first void the pick slip before you can cancel the item.
- The order line contains a set component item and you do not have authority to the *Set Component Maintenance (J01)* secured feature.
- The order is from Order Orchestration (delivery or pickup) or is a store pickup order, based on the *Broker Delivery Type*, and you do not have authority to the *Cancel Order Broker Lines (B19)* secured feature.

- The order is from Order Orchestration (delivery or pickup), based on the *Broker Delivery Type*, and you do not have authority to the *Maintain Brokered Fulfillment Orders (B20)* secured feature.

Sell Out an Order Line

1. Select **Sell Out** from the actions menu (⋮) in the *Order Lines Panel* for an order line to lock the order and advance to a confirmation window.
2. At the **Confirm Sell Out** window, select the **Yes** option to sell out the order line; otherwise, select **No** to cancel.
3. If you select to sell out the order line:
   - The system displays a message indicating the update was performed.
   - The status of the line changes to **S Soldout** and the system recalculates the tax on the order.
   - If the item is a main set item, the main set item and all of its components are sold out.
   - If the only item on the order is sold out, the status of the order updates to closed.
   - The freight on the order is reduced, if appropriate for the reduced merchandise total. This update takes place automatically; no message is displayed.

The **Sell Out** option is not available if:

- The order is currently locked by another user, the system, or another session.
- The order line is in a status other than open or held.
- The order line contains a reserved quantity.
- The order line is a main set item and all of the components of the main set item are reserved.
- The item is a set component item and you do not have authority to the *Set Component Maintenance (J01)* secured feature.
- The order is a store pickup order, based on the *Broker Delivery Type*.

Add a Coordinate Item

Select **Coordinates** from the actions menu (⋮) in the *Order Lines Panel* for an order line to lock the order and advance to the *Select Coordinate Items* page.

This option is available only if one or more coordinate items have been defined for the item, and if the does not have the **Promo windows** flag set to **None**.

Review an Item's Personalization Details

In the *Order Lines Panel*, select the *Personalization (Special Handling)* link for an item to advance to the *Personalization Information* window.

> **Note:**
>
> This option is available only if personalization has been defined for the item. In addition, the **Personalization** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Review Drop Ship Information

Select the *Drop Ship* link for an item on the order to advance to the *Drop Ship Details* window.

Note: The **Drop-ship** link displays only for open drop ship items. The system considers an item a drop ship item if the **Drop Ship Flag** in the Order Detail table is set to **D**. However, the *Drop Ship Details* window opens to drop ship information is displayed only if the order line is open and is being fulfilled through integration with Order Orchestration's Supplier Direct Fulfillment module. Otherwise:

- If the item is a drop ship item but is not being fulfilled through Order Orchestration's Supplier Direct Fulfillment module, when you click the Drop-Ship link, a message indicates Drop ship purchase order activity does not exist for this drop ship item.
- If the item is a drop ship item that has been fulfilled, the **Drop-ship** link is not available.

Review Brokered Information

Select the *Brokered* link for an item on the order to advance to the *Broker Details* window.

Note: The **Brokered** link displays only if:

- The item has been submitted to the Order Broker for fulfillment (brokered backorder), or
- The customer picks up the order up at a retail location where the inventory is available (store pickup), or
- The order was assigned to Order Administration for fulfillment (delivery or pickup), or
- The order ships to a store location, where the customer picks it up (ship-for-pickup), and a pick slip or drop ship pick slip or purchase order has already been generated for the order line.

Review the Invoice Associated with a Shipped or Returned Order Line

In the *Order Lines Panel*, select the *Invoice* link for an order line to advance to the *Invoice* page.

Review Tracking Information for a Shipment

1. In the *Order Lines Panel*, expand the **Track Shipments** drop-down field for an order line to display the *Tracking Number*(s) associated with the shipment that contains the item on the order line.
2. Click a tracking number to advance to the carrier's web site.
    - For set items, the tracking number displays for the set component item and not the main set item.
    - The Track Shipments option is available only if a tracking number is defined for one or more shipments, and if the shipment was confirmed through the Pick In message, with carton details specified, in release 21.0 or later. The option is not available if:

  - The shipment was confirmed through the Manual Confirmation (MCON) option, or
  - The shipment was confirmed through the Pick In message, but no carton details were specified, or
  - This is the originating order, rather than the fulfilling order, for a shipment processed through the Order Broker integration, or
  - The shipment was confirmed in a release prior to 21.0.
- The tracking number is a live link if the ship via type is UPS, Federal Express, or Parcel Post (not Parcel Post Class 1, 2, 3, or 4). If the link is live, you can click it to advance to the shipper's web site and review shipment history.

If tracking information is known: Regardless of whether the Track Shipments option is available for individual shipped items, the Shipment Tracking Details option is still available at the order ship-to level.

For more information, see *Review Tracking Information for the Order Ship-To*.

If using Narvar: If you are using the Narvar integration, the *Tracking Number* is a live link enabling you to track the shipment, provided:

- You have completed setup of the related system control values, including the *Narvar Track URL Prefix (M60)*.
- You have specified the **Narvar Carrier Name** for the ship via.
- You specified a tracking number when confirming the shipment.
- All other configuration was completed for Narvar, as described under **Narvar Integration Setup** in the Classic View online help.

> **Note:**
>
> - After you enable Narvar, tracking number links that were created previously do not work automatically when you click on them at this screen.
> - The tracking number link can still be available if all the above requirements are met, even if the customer did not receive a shipment confirmation when, for example, the customer has opted out of email communication.
> - The tracking link is not supported for drop ship purchase orders or shipments made through the Order Broker integration. The tracking link is supported for drop ship picks.

Required for tracking: The *Narvar Track URL Prefix (M69)* is required for a valid tracking number link to be enabled in emails or on screens. If you are using the Narvar integration and submit an order request to Narvar while the tracking URL prefix is not defined, the Narvar.log file contains errors such as:

- `Shipment tracking is disable for company 123`
- `Unable to construct shipment tracking URL for order 456`

Where `123` is the company number and `456` is the order number.

Error displayed: Also, if the tracking URL is not defined, when you click on the tracking number link at the screens mentioned above, an error window indicates: `Tracking`

```
information not available. Check Narvar Order Error Export
screen for failures.
```

If not using Narvar: Otherwise, if you are not using the Narvar integration:

- **Supported ship via types:** Live links to shipment tracking web pages for shippers are available if the ship via type is:
  - UPS
  - Federal Express
  - Parcel Post (**not** Parcel Post Class 1, 2, 3, or 4)
- If the ship via type is anything other than UPS, Federal Express, or Parcel Post, you can still advance to the Display Tracking Numbers screen; however, the tracking number is not a live link.

> **Note:**
>
> You can also review all tracking information for the order ship-to. See *Review Tracking Information for the Order Ship-To*

Check Inventory for an Item

Select **Check Item Availability** from the actions menu (⋮) in the *Order Lines Panel* for an order line to check availability.

- If the *Use Merchandise Locator (I38)* system control value is unselected or if the *Use Merchandise Locator (I38)* system control value is selected but the item is not eligible for the merchandise locator, you advance to the *Item Availability* window.
- If the *Use Merchandise Locator (I38)* system control value is selected and the item is eligible for the merchandise locator, you advance to the *Item Availability (Merchandise Locator)* window.

> **Note:**
>
> - For set items, the **Item Availability** option is available for the set component item and not the main set item.
> - In *Order Summary* and *Customer Items List* pages, the **Check Item Availability** option is available only for order lines whose status is **Open**, **Held**, **Soldout**, **Suspended**, or **Express Bill**. It is not available for orders in **Error** status.

Review Item Information on the E-Commerce Web Site

Select **Item Information** from the actions menu (⋮) in the *Order Lines Panel* for an order line to open a new browser window displaying the item details page on the client e-commerce website.

- If the item contains SKU's, the system advances you to the URL defined at the SKU level; if a URL is not defined at the SKU level, the system advances you to the URL defined at the item level.
- The **Item Information** option is available only if a valid URL is defined for the item on the Item Image/Info Link screen in the **Work with Items/SKU's (MITM)** menu option.

Review Order Line Activity

Select **Order Line Activity** from the actions menu (⋮) in the *Order Lines Panel* for an order line to open the *Order Line Activity* window.

Review an Order Line

Select **Order Line Details** from the actions menu (⋮) in the *Order Lines Panel* for an order line to lock the order and to advance to the *Order Line Details* page. The Pre-Discount Price displays on the Order Line Details of the Order Summary page. This price is helpful when evaluating discounts applied by ORPE.

Return or Exchange an Order Line

Select **Return** from the actions menu (⋮) in the *Order Lines Panel* for an order line with a shipped, unreturned quantity to lock the order and advance to the *Return Order Line* page.

For set items, the **Return** option is available for both the main set item and the set component items.

Hide or Show the Information about an Order Line

Click within the title of the *Order Lines Panel* for an order line to hide or show the order line information.

Add a Payment to the Order

In the *Payment Information Panel*, select the **Add Payment** option to lock the order and advance to the *Add Payment* window.

The **Add Payment** option is not available for orders from Order Orchestration (delivery or pickup) or store pickup orders, based on the *Broker Delivery Type*.

Add a Credit Card or Debit Card Payment

Oracle Retail EFTConnect provides credit card validation and processing through *Account Providers* such as CyberSource, Adyen, external payment services (EPS) and other custom Oracle Payment Interface (OPI) payment services. You need to configure your merchant account and set up all credit card or debit card payment methods through the Payment Configurations page. You cannot create or modify credit card or debit card payment methods through the Work with Pay Types (WPAY) screen in Classic View. See the Payment Configurations page for more information.

1. Select **Add Payment** to open the *Add Payment* window and lock the order.
2. Select a credit or debit card payment from the *Payment Method* drop down box.
3. Enter an *Amount to Charge*. Leave this field blank if the payment method is the catch-all for the order.

4. Select **OK** to display the additional fields related to this payment method. These are dynamic fields that are validated by the payment provider. The content varies depending on whether CyberSource, Adyen, EPS, or OPI custom payment provider was selected as the *Account Provider*. Enter the required details such as a *Card Number*, the *Expiry Month* (MM format) and *Expiry Year* (YY format), the card's *Security Code* (CVV/CID/CVC) and other fields as applicable.
5. Select **Pay** to add the payment method to the order. An error message indicates if any of the entered fields are invalid.
6. If the payment passes validation by the payment provider, the system:
   - Displays a message indicating the payment was added to the order.
   - Displays the newly added payment in the Payment Information panel.
   - Returns a temporary token.
   - If the returned vendor response is associated with a hold reason code, the system places the order on hold and displays a message indicating the order has new holds.

If an error occurs whilst loading the service or after selecting **Pay**, and the payment provider form cannot be displayed, retry or select a new form of payment.

If the system times out before receiving an authorization response or authorization is declined, the payment is not added.

See *Online Authorization Processing* for more information on processing, updates, and displayed messages when the payment method uses online authorization.

Add a Manual Authorization

In the Payment Information Panel, select the **Add Authorization** option actions menu (⋮) for a credit card, debit card, or stored value card (gift card) payment method. The system locks the order and opens the Add Authorization window.

Use Authorize Now

Optionally, for a credit card, debit card, or stored value card (gift card) payment method send/receive an online authorization transaction using the card token. In the *Payment Information Panel*, from the **Actions** menu (⋮), select the select the **Authorize Now** option. The order is locked.

The **Authorize Now** field displays only if the **Manual Authorization** field is unselected, the *Online Authorizations (B89)* system control value is selected, and the **Online Authorization** field for the origin on the order (order type) is set to **Window** or **Without Window**. If *On-Line Auth Verification Only I96* system control value is selected, the system will send an authorization for 0.00 instead of 1.00.

Select **OK** to confirm authorization for this payment method.

Perform Balance Inquiry Against a Gift Card Payment

1. In the *Payment Information Panel*, from the **Actions** menu (⋮), select the **Check Gift Card Balance** option for a gift card payment method.
2. The system looks at the *Authorization Service* field defined for the gift card payment in the **Work with Pay Types (WPAY)** menu option to determine the service bureau that performs balance inquiries for the gift card payment. An error

message displays if an authorization service is not defined for the payment in the **Work with Pay Types (WPAY)** menu option.

3. The system sends a balance inquiry request to the service bureau.
4. If the response returns an error, the system displays an error message.
   - If the vendor response returned matches a vendor response in the CC Vendor Response table, the system displays the message defined for the vendor response.
   - If the vendor response returned does not match a vendor response in the CC Vendor Response table, the system displays a message indicating the vendor response is not recognized and provides the error returned in the balance inquiry response.
   - If a response is not received from the service bureau, the system displays a message indicating the balance inquiry could not be performed.
5. If the response includes the card balance amount, the system displays the *Card Balance* in the *Check Gift Card Balance* window.

> **Note:**
>
> The **Check Gift Card Balance** option is available only if you have authority to the **Stored Value Card Balance Inquiry (MSVB)** menu option.

Review Payment Method Details

In the *Payment Information Panel*, from the **Actions** menu (⋮), select the **View Details** option for a payment method on the order to advance to the *Payment Method Details* window.

Update a Cash or Check Payment on the Order

In the *Payment Information Panel*, from the **Actions** menu (⋮), select the **Edit** option for a payment method on the order. The system locks the order and advances you to the *Edit Payment* window.

The **Edit** option is not available if:

- The order is a credit card, debit card, wallet, or stored value (gift) card.
- The order is already locked by another user, the system, or another session.
- You do not have authority to the **Enter/Maintain Orders (OEOM)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option; you can define menu option authority for a user class in the **Work with User Classes (WUCL)** menu option.
- The payment method is PayPal.
- The payment method is deactivated.
- The order is from Order Orchestration (delivery or pickup) or is a store pickup order, based on the *Broker Delivery Type*.

Edit the Expiration Date for a Payment Method

1. In the Payment Information Panel, from the **Actions** menu (⋮), select the **Edit Expiration Date** option for an EFTConnect pay type on the order. The system opens the **Edit Expiration Date** window.

2. This window displays the Payment Method. Enter a new expiration date in MM/YY format. Your entry must be the current month or later.
3. Select **OK** to apply the new expiration date. A request is sent to EFTConnect to update the expiry date.

   If successful, the Order Summary page is displayed with the new expiration date displayed in the *Payment Information Panel*.

   If EFTConnect fails to get a response, a communications error is displayed. Also, a failure may occur if the customer token value provided by the payment service provider in the authorization response is not included when the order was submitted.

   If a **failure** response is returned:

   a. Do not update the expiration date in the Order Payment Method.
   b. The dialog is closed and returns to the Order Summary screen.
   c. Display a *Snackbar Notification* on the Order Summary screen: Edit Expiration Date failed.

Changing the Expiration Date creates two Activity records under the Activity Table in the Payment Method Details panel, for example:

- An Activity of Card Number Changed (A) with a Note of card number has been changed.
- An Activity of Maintenance (M) with a Note of CC Exp Dt: 1022 to 1224.

The invoice number displayed for these Activity records is 0.

Deactivate a Payment on the Order

Use the **Deactivate** option to:

- Stop any further billing against a payment card used on an order, such as when the card is stolen.
- Stop trying to authorize a card that continues to decline.
- Replace with a new card for all future billing.

> **Note:**
>
> You cannot change or reactivate a deactivated payment type. If all pay types are deactivated, you must enter a valid pay type to release the order from hold, or cancel the order.

1. In the *Payment Information Panel*, from the **Actions** menu (⋮), select the **Deactivate** option for a payment method on the order. The system advances you to the **Confirm Deactivation** window.
2. At the **Confirm Deactivation** window:
   - Select the **Yes** option to deactivate the payment.
   - Select the **No** option to cancel the deactivation.
3. The system returns you to the **Order Summary** page. If you selected to deactivate the payment, the system locks the order, deactivates the payment, and displays a

message indicating the payment has been deactivated. The system updates the charge sequence number for the payment to **99**.

> **Note:**
>
> You will not be able to unlock the order if there are no active payments defined for the order; you must add at least one payment to the order before you can unlock the order.

The **Deactivate** option does not display:

- If the payment has already been deactivated.
- For a cash/check payment.
- For a card payment that has no authorization or payment history.
- For a card payment with a refund due; instead, you must use the **Work with Refunds (WREF)** menu option to cancel the refund for the order or change the refund type.

Remove a Payment from the Order

1. In the *Payment Information Panel*, from the **Actions** menu (⋮), select the **Delete** option for a payment method on the order. The **Confirm Delete** window opens.
2. At the **Confirm Delete** window:
   - Select the **Yes** option to remove the payment from the order.
   - Select the **No** option to cancel the removal.
3. You return to the **Order Summary** page. If you selected to delete the payment, the system locks the order, removes the payment, and displays a message indicating the payment has been removed.

> **Note:**
>
> You will not be able to unlock the order if there are no active payments defined for the order; you must add at least one payment to the order before you can unlock the order.

The **Delete** option does not display:

- For a payment that is authorized or billed. In this situation, you must use the **Deactivate** option to deactivate the payment instead.
- If a processed refund exists for the payment.
- If authorization history exists for the payment.

Review or Work with Order Messages or Order Notes

Select **Message** at the top of the page to advance to the Messages page for the current order.

> **Note:**
>
> You can add an order message regardless of whether the order is locked.

Perform a New Search

Select the **Search** option above the page to return to the *Search for Orders or Customers* page.

Review Order Activity

Select **Order Activity** at the top of the page to advance to the *Order Activity* page for the current order.

Review and Enter Order Notes and Other Customer Messages

Select **Messages** at the top of the page to advance to the Messages page.

Review Refunds and Returns for the Order

At the top of the page, select the **Returns/Refunds** option to advance to *Returns/ Refunds* page.

Review Invoices for the Order

Select the **Invoices** option at the top of the page to advance to the *Invoices* page.

Unlock the Order

Select **Unlock Order** at the top of the page or press CTRL + ALT + u to process any remaining order updates and unlock the order so that it is available for maintenance by another user.

The system may display a warning or error if data on the order needs to be corrected.

When you unlock and accept an order, Contact Center does not check for expired credit cards.

> **Note:**
>
> The **Unlock Order** option displays only if you have locked the order in the current session; it does not display if another user has locked the order. In this case, you can use the *Unlock Order* option if you have the required authority.

For more information: See *Maintaining an Order* for more information about locking and unlocking an order.

Fields on Order Summary

Purpose: The following information displays on the **Order Summary** page.

- *Order Summary Tab Fields*

- *Order Orchestration Message Fields*
- *Sold-To Panel Fields*
- *Order Summary Tiles Fields*
- *Ship-To Panel Fields*
  - *Ship-To Details Panel Title Fields*
  - *Ship-To Address Panel Fields*
  - *Shipment Tracking Details Panel*
  - *Order Lines Panel Fields*
- *Additional Order Details Panel Fields*
- *Edit Additional Order Details Panel*
- *Payment Information Panel Fields*
- *Order Totals Fields*

For more information:

- *Order Summary* for an overview of the **Order Summary** page.
- *Order Summary Options* for step-by-step instructions on the actions you can perform on the **Order Summary** page.

Order Summary Tab Fields

The *Order Number* displays in the page tab for the **Order Summary** page.

Order Orchestration Message Fields

An Order Orchestration message displays below the page title if:

- This is a delivery or retail pickup (ship-to-store) order assigned by Order Orchestration to Order Administration for fulfillment, or
- The *Broker Delivery Type* is **Store Pickup**

The message displayed is:

- `This order line was brokered to OACS for fulfillment. Use caution when maintaining the order` if you have authority under the *Maintain Brokered Fulfillment Orders (B20)* secured feature, Otherwise,
- `Order Locked in Broker` if do NOT have authority under the *Maintain Brokered Fulfillment Orders (B20)* secured feature.

Sold-To Panel

The sold-to customer is the customer that placed the order. The **Sold-To** panel displays the following fields for the sold-to customer.

- *Customer Name* (unlabeled field below the **Sold-To** title): The customer name displays in prefix, first name, middle initial, last name, and suffix format, and the sold-to *Customer Number* is indicated in parentheses.

  If the *ORCE Customer Integration (L37)* system control value is set to INTERACT, and the Use Oracle Retail Customer Engagement Customer Number on Search flag in Work with Contact Center (WWCC) is selected, this is the Customer Engagement ID. Otherwise, it is the Order Administration customer number.

If a *Company Name* is also defined, the company name displays below the sold-to customer name.

If a *Company Name* is defined without a sold-to customer name, the company name displays in place of the sold-to customer name.

- *Customer Since*
- Customer totals:
  - Purchases (*Total Orders*)
  - Lifetime Value (*Purchase Total*)
  - Return Rate: The total value of returns for the customer divided by the total purchases.
- *Customer Address*
- *Phone Number* (unlabeled fields below the **Customer Address**): Up to three phone numbers may be shown with the type shown in brackets such as (508) 652–3800 (Business).

  The **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option. If more than one phone number is defined for the sold-to customer and only one is shown such as in a one-time ship-to order, the system uses the following hierarchy to display the phone number:
  - home phone number
  - business phone number that also supports a phone extension
  - mobile or fax phone number as determined by Third Phone Number Type (L53) system control value.

  The phone number displays the telephone number format defined for the country (as defined in Work with Country (WCTY)) on the customer's address.

  > **Note:**
  >
  > The **Phone Number** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

- *Email Address* (unlabeled field below the **Phone Number**): This is the sold-to customer's primary email address. This field displays only if an email address is defined for the customer.
- *Opt-In Status* (unlabeled field below the **Email Address**): This is the opt-in status defined for the sold-to customer's primary email address. This field displays only if an email address is defined for the customer.

Order Summary Tiles

These three tiles provide the following information and links:

- Order Total Tile:
  - *Order Total*
  - Order *Currency Code*
  - Link to *Payment Information Panel*

- Recent Activity tile:
  - The most recent *Order Activity*
  - The date of the most recent order activity (*Order Broker Date*)
  - Link to the *Order Activity* page
- *Order Status*. Includes a link to the *Order Holds* window if there are any hold reasons applied to the order

Ship-To Panel

The **Ship-To** panel displays the details for a ship-to on the order, including the ship-to order's name and address, and the items assigned to the ship-to order.

There is a separate ship-to panel for each ship-to on the order.

Ship-To Details Panel Title

The title of this panel varies, depending on the setting of the *Broker Delivery Type*:

- If the **Broker Delivery Type** is blank, the title of this panel is **Ship-To #**, where # is the *Ship-To Number*.
- If the **Broker Delivery Type** is **S** (Ship for Pickup), the title of this panel is **Ship for Pickup**. **Note:** This includes pickup orders that originated in a store location (retail pickup).
- If the **Broker Delivery Type** is **P** (Store Pickup), the title of this panel is **Store Pickup**.

The ship-to customer name is also indicated in parentheses.

Next to the name, a badge denotes whether the ship-to address shown originates from the primary address, is an entry from the address book, is a one-time ship-to address or is a recipient address.

When an address book ship-to is assigned to an order, the Address Book Number is displayed within the Address Book badge.

When an address book ship-to or a recipient ship-to is edited from the Order Summary tab, the ship-to is converted to a One Time Address upon edit. The address changes ONLY apply to that order. Neither the Address Book entry nor the Recipient Sold To records are updated. If the address book ship-to or recipient ship-to had multiple phone numbers assigned, a single phone number is displayed (without a phone number label) for the One-Time Ship-To. The phone number is selected based on the following hierarchy:

1. Home
2. Business
3. Mobile (or Fax)

Ship-To Address Panel

Where Does the Ship-To Address Come From?

Depending on how you create the order, the shipping address can be from one of the following locations.

For a customer ship-to address:

- An order-level shipping address that is stored in the Order Ship To Address table.

- A permanent shipping address for the sold-to customer on the order, stored in the Customer Ship To table.
- A recipient customer, stored in the Customer Sold To table.
- The name and address of the Customer Sold To who placed the order, stored in the Customer Sold To table.

For a store ship-to address:

- The name and address of the store where the customer will pick up the order, stored in the Store Cross Reference table.

The **Ship-To Address** panel displays the following fields:

- *Customer Name* or *Store Name* (unlabeled field below the panel title): The customer name is in prefix, first name, middle initial, last name, and suffix format.
  - If a *Company Name* is also defined, the company name displays below the ship-to customer name.
  - If a *Company Name* is defined without a ship-to customer name, the company name displays in place of the ship-to customer name.
- *Customer Address* or *Store Address* (unlabeled fields below the **Customer Name** or **Store Name**)
- *Phone Number* (unlabeled field below the **Address**): If more than one phone number is defined for the sold-to customer and only one is shown such as in a one-time ship-to order, the system uses the following hierarchy to display the phone number:
  - home phone number
  - business phone number that also supports a phone extension
  - mobile or fax phone number as determined by *Third Phone Number Type (L53)* system control value.

  The phone number displays the telephone number format defined for the country (as defined in Work with Country (WCTY)) on the customer's address.

  > **Note:**
  >
  > The **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

- *Email Address* (unlabeled field below the **Phone Number**): This is the ship-to customer's primary email address. This field does not display for a store address. This field displays only if an email address is defined for the customer.
- *Opt-In Status* (unlabeled field below the **Email Address**): This field does not display for a store address. This field displays only if an email address is defined for the customer.
- *Attention*: Displayed only if an attention line was specified for the order.

Ship-To Information Panel

- *Status*: This is the status of the ship-to order, which can be different from the *Order Status*. If the ship-to status is **Held**, an attention icon displays to the left of the status.

- Merchandise(*Merchandise*)
- *Additional Charges*
- *Ship Via* description and code

Additional Information Panel

Select **Additional Information** to view or hide the Additional Information panel. Each field is blank or 0.00 if there is no data in the field for the order.

- *Customer Name* or *Company Name* and *Ship-To Number*
- *Arrival Date*
- *Tax Identification*
- *Carrier Number*
- *Cancel Date*
- *Purchase Order Number*
- *Ship Complete*
- *Backorder Priority*
- *Calculate Shipping (Freight)*
- *Cancel Backorder*
- *Estimated Shipping (Freight)*
- *Broker Delivery Type*
- *Shipping Override*
- *Gift*
- *Shipping Tax Override*
- *Discount Percent*
- *Shipping Tax Rate*
- *Tax Code*
- *Warehouse*: This field is not displayed if the system determined which warehouse to use. In addition, the **Warehouse** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Shipment Tracking Details Panel

This panel provides shipment tracking information for all shipments for the order ship-to.

- *Customer Name* or *Company Name* and *Ship-To Number*

For each shipment tracking number:

- *Ship Date*: For set items, the ship date displays for the set component item and not the main set item.
- *Ship Via* description
- *Tracking Number*:
  - For set items, the tracking number displays for the set component item and not the main set item.

- This field displays only if a tracking number is defined for the shipment. The tracking number is a live link if the ship via type is UPS, Federal Express, or Parcel Post (not Parcel Post Class 1, 2, 3, or 4). If the link is live, you can click it to advance to the shipper's web site and review shipment history, provided you have access to the World Wide Web.
- **If using Narvar:** If you are using the Narvar integration, the *Tracking Number* is a live link enabling you to track the shipment, provided:
  - You have completed setup of the related system control values, including the *Narvar Track URL Prefix (M60)*.
  - You have specified the **Narvar Carrier Name** for the ship via.
  - You specified a tracking number when confirming the shipment.
  - All other configuration was completed for Narvar, as described under Narvar Integration Setup in the Classic View online help.

  Note:

  - After you enable Narvar, tracking number links that were created previously do not work automatically when you click on them at this screen.
  - The tracking number link can still be available if all the above requirements are met, even if the customer did not receive a shipment confirmation when, for example, the customer has opted out of email communication.
  - The tracking link is not supported for drop ship purchase orders or shipments made through the Order Orchestration integration. The tracking link is supported for drop ship picks.
- **If not using Narvar:** Otherwise, if you are not using the Narvar integration:
  - **Supported ship via types:** Live links to shipment tracking web pages for shippers are available if the ship via type is:
    - UPS
    - Federal Express
    - Parcel Post (**not** Parcel Post Class 1, 2, 3, or 4)
    - If the ship via type is anything other than UPS, Federal Express, or Parcel Post, you can still advance to the Display Tracking Numbers screen; however, the tracking number is not a live link.

- *Invoice*: For set items, the invoice displays for the set component item and not the main set item.

Additional shipped item details: If the shipment was confirmed through the Pick In message, with carton details specified, in release 21.0 or later, the Shipment Tracking Details panel displays the following information for each shipped item:

- *Item ID*
- *Item Description*
- *Item Image*, if the *Use External Item Image (L55)* system control value is selected
- Quantity (Shipped Quantity for this tracking number)
- The additional shipped item detail information is not displayed if:

- The shipment was confirmed through the Manual Confirmation (MCON) option, or
- The shipment was confirmed through the Pick In message, but no carton details were specified, or
- This is the originating order, rather than the fulfilling order, for a shipment processed through the Order Broker integration, or
- The shipment was confirmed in a release prior to 21.0.

Order Lines Panel

The system displays item information for each order line associated with the order ship-to. Items display for the order ship-to in ascending order line number sequence.

For sets on an order, the system groups the set components items under the main set item.

The following fields display for each order line.

Order line banner:

- *Order Line Number* (unlabeled field before the item ID)
- *Item Description* (unlabeled field to the right of the **Order Line Number**)
- *Item ID* (unlabeled field in parentheses to the right of the **Item Description**)
- *SKU Description* (unlabeled to the right of the **Item Description**). From the SKU description if the *Display SKU Element in Place of SKU Element (F25)* system control value is selected; otherwise, displays the SKU element.
- **Status** (*Order Line Status*)
- Return in Progress badge. A blue badge next to each item on an order that has a Return in the Created or Received status (but not yet credited or cancelled), indicates whether an item detail is associated to a Return Authorization in process. This negates the need to navigate to the Returns/Refunds tab to check.

Order line details:

- *Item Image*: Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no item or SKU image has been defined. Display-only.
- *Item Information Link*: Displayed if an item information link has been defined and the *Use External Item Image (L55)* system control value is selected.
- *Main Set Item*: This field displays only if the item is a main set item.
- **Set**: The item description and item ID of the associated main set item displays; for example: `BATH SET (B123)`. This field displays only if the item is a set component item.
- *Unit Price*: Unit Price is the price the customer is being charged for one unit of the item. To the left of the unit price, is the offer price with a strikethrough. The offer price with strikethrough only appears if the offer price is greater than the unit price and *Display Order Line Discount Message (F01)* system control value is selected. If system control value F01 is not selected or the offer price is less than unit price, then only the unit price is shown. When SCV F01 is selected and an offer price with strikethrough is shown, this is meant to represent the customer received a discount on this item.

  For set items, the unit price displays for the main set item and not the component items.

- Hovering on the order line information icon, where an entitlement discount was applied, displays a tooltip with the itemized unit discount amount applied for the entitlement. Where multiple promotions were applied, each will have its own entry in the tooltip.
- **Ordered** (*Ordered Quantity*)
- *Extended Price*: For set items, the extended price displays for the main set item and not the component items.
- *Gift Wrap Charge*: This field displays only if gift wrap has been defined for the item (the **Gift Wrap** for the order line in the Order Detail table is **Y**). In addition, the **Gift Wrap Charge** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- **Reserved** (*Reserved Quantity*)
- *Personalization (Special Handling)*: This field displays only if personalization has been defined for the item (the **Add Addl Chg Code** for the order line in the Order Detail table contains a value). In addition, the **Personalization** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- **Personalization Charge (***Personalization (Special Handling) Charge*): This field displays only if personalization has been defined for the item (the **Add Addl Chg Code** for the order line in the Order Detail table contains a value).
- **Sold Out** (*Sold-Out Quantity*)
- **Canceled** (*Canceled Quantity*)
- **Printed** (*Printed Quantity*)
- **Shipped** (*Shipped Quantity*): Within an order line, shipped items are grouped by invoice number. For set items, the shipped quantity displays for the set component item and not the main set item.
- *Ship Date*: For set items, the ship date displays for the set component item and not the main set item.
- *Invoice*: For set items, the invoice displays for the set component item and not the main set item.
- *Credited* (Credited Quantity): Within an order line, credited items are grouped by invoice number. For set items, the credited quantity displays for the set component item and not the main set item.
- *Credited Date*: For set items, the credit date displays for the set component item and not the main set item.
- **Track Shipments (#), where # is the number of tracking numbers associated with the shipment** (*Tracking Number*): Expand the **Track Shipments** drop-down field to display the tracking number(s) for the shipment that contained the item on the order line.
  - For set items, the tracking number displays for the set component item and not the main set item.
  - This field displays only if a tracking number is defined for the shipment. The tracking number is a live link if the ship via type is UPS, Federal Express, or Parcel Post (not Parcel Post Class 1, 2, 3, or 4). If the link is live, you can click it to advance to the shipper's web site and review shipment history, provided you have access to the World Wide Web.

- **If using Narvar:** If you are using the Narvar integration, the *Tracking Number* is a live link enabling you to track the shipment, provided:
  * You have completed setup of the related system control values, including the *Narvar Track URL Prefix (M60)*.
  * You have specified the **Narvar Carrier Name** for the ship via.
  * You specified a tracking number when confirming the shipment.
  * All other configuration was completed for Narvar, as described under Narvar Integration Setup in the Classic View online help.

  Note:
  * After you enable Narvar, tracking number links that were created previously do not work automatically when you click on them at this screen.
  * The tracking number link can still be available if all the above requirements are met, even if the customer did not receive a shipment confirmation when, for example, the customer has opted out of email communication.
  * The tracking link is not supported for drop ship purchase orders or shipments made through the Order Broker integration. The tracking link is supported for drop ship picks.
- **If not using Narvar:** Otherwise, if you are not using the Narvar integration:

  Supported ship via types: Live links to shipment tracking web pages for shippers are available if the ship via type is:
  * UPS
  * Federal Express
  * Parcel Post (**not** Parcel Post Class 1, 2, 3, or 4)
  * If the ship via type is anything other than UPS, Federal Express, or Parcel Post, you can still advance to the Display Tracking Numbers screen; however, the tracking number is not a live link.

- **Returned** (*Returned Quantity*)
- *Return Date*
- *Drop Ship*: This field displays only if the item's order line status is **Open**, and the item is flagged as a drop ship item (the **Drop Ship Flag** in the Order Detail table is set to **D**).
- *Brokered*: This field displays only if the item's order line status is **Open**, and:
  - The item has been submitted to the Order Broker for fulfillment (brokered backorder), or
  - The customer picks up the order up at a retail location where the inventory is available (store pickup), or
  - The order was assigned to Order Administration for fulfillment (delivery or pickup), or
  - The order ships to a store location, where the customer picks it up (ship-for-pickup), and a pick slip or drop ship pick slip or purchase order has already been generated for the order line.
- *Expected Ship Date*

Additional Order Details Panel

- *Order Number*

- *Order Date*
- *Order Email*
- *Alternate Order Number*
- *Entered By*
- **Date Entered** (*Entered Date*)
- *Source*
- *Origin (Order Type)*
- *Quote Origin*
- *Batch Number*
- *Sales Representative*
- *Sales Representative Store*

Edit Additional Order Details Panel

- *Order Number*
- *Order Date*
- *Order Status*
- *Quote Origin*
- *Alternate Order Number*
- *Entered By*
- **Date Entered** (*Entered Date*)
- *Origin (Order Type)*
- *Source*
- *Customer Class*
- *Order Email*
- *Email Opt-In*
- *User Hold Reason*
- *Sales Representative*. If the Sales Representative is changed, the Sales Representative Store is not updated automatically. You need to change the store separately.
- *Sales Representative Store*. You must have authority to the *Maintain Originating Store # During Order Maintenance (B23)* secured feature to change the Sales Representative Store, otherwise the field is display-only.

Payment Information Panel

The **Payment Information** panel displays information for each payment method on the order. Payment methods apply across recipients.

Payment records display in ascending charge sequence, ascending payment method description sequence. The catch-all payment method displays last.

The **Payment Information** panel displays the following fields:

- *Payment Method*:

- The last four digits of the credit card number displays after the payment method description in parenthesis. For example: `VISA (1234)`. This is the **CC Last 4** from the Order Payment Method table.
- The check number displays after the payment method description in parenthesis. For example: `Check (12345)`. This is the **OPM Check Number** from the Order Payment Method table.

- *Expiration Date*: The expiration date may be zero, depending on the setting of the **Require expiration date** flag for the payment. For example, a gift card **Card Type** typically does not require an expiration date.
- *Amount to Charge*:
  - `Balance` displays next to the catch-all payment method on the order, indicating the balance of the charge for the order applies to the payment method. The balance charge occurs after charges to all other pay types on the order have reached their defined limit.
  - `Deactivated` displays next to a credit card payment method that has been deactivated.
- *Amount Billed*
- *Amount Credited*

Order Totals

The **Order Totals** at the bottom of the page includes the following fields:

- *Merchandise* discounts triggered by entitlement coupons are included when calculating and displaying the informational messages with the total discounts applied to the invoice.
- *Shipping*. An exclamation point icon indicates if a *Shipping Override* was applied to the order. Shipping discounts triggered by entitlement coupons are included when calculating and displaying the informational messages with the total discounts applied to the invoice.

- *Additional Shipping*
- *Additional Charges*
- **Personalization** (*Personalization (Special Handling) Charge*)
- *Tax*
- **Total** (*Order Total*)
- *Currency Code*
- *Award Applied*

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Edit Additional Order Details

Overview: Use the **Edit Additional Order Details** panel to update order header information.

How to display: Select the **Edit** option on the **Additional Order Details** panel of the *Order Summary* page. When you advance to this page, the system locks the order; see *Maintaining an Order* for more information about locking and unlocking an order.

The **Edit** option is available only if:

- the order is not currently locked by another user or session or by the system,
- you have authority to the *Order Maintenance Access (A22)* secured feature,
- if there is a printed quantity on any order line, you have authority to the *Maintain Order with Printed Quantity (J05)* secured feature,
- the order is from Order Orchestration (delivery or pickup) based on the *Broker Delivery Type* and you have authority to the *Maintain Brokered Fulfillment Orders (B20)* secured feature.
- the order is not a store pickup or ship for pickup order, based on the *Broker Delivery Type*.

For more information:

- *Edit Additional Order Details Options* for step-by-step instructions on the actions you can perform on the **Edit Additional Order Details** panel.
- *Fields on Edit Order Details* for a description of the fields on the **Edit Additional Order Details** panel.

Edit Additional Order Details Options

Purpose: You can perform the following actions on the **Edit Additional Order Details** panel.

- *Review Held Order Status Information or Release Holds*
- *Change a Quote to a Non-Quote Order*
- *Update the Order Email*
- *Update the Email Opt-In*
- *Update the Customer Class*
- *Update the Sales Representative*
- *Place the Order on User Hold*

For more information:

- *Edit Additional Order Details* for an overview of the **Edit Additional Order Details** panel.
- *Fields on Edit Order Details* for a description of the fields on the **Edit Additional Order Details** panel.

Review Held Order Status Information or Release Holds

Select the **Held** *Order Status* link to advance to the *Order Holds* window. This option is available only if one or more hold reasons are currently assigned to the order and it is in Held status.

Change a Quote to a Non-Quote Order

1. Select a different *Origin (Order Type)* setting.
2. Select the **Update** option.

You cannot change the Origin for any other type of order.

Update the Order Email

1. Update the **Order Email** (*Email Address*).
2. Select the **Update** option. The system verifies that:
   - There is an @ sign and a period (.),
   - There is some text before the @ sign, between the @ sign and the period, and after the period.
3. If the update is successful, the system returns you to the *Order Summary* page and displays a message indicating your changes have been saved.
   - You must select the **Unlock Order** option or press CTRL + ALT + u to accept all of the changes that you have made to the order.
   - When you enter a new email address in order maintenance, this email address is used as the order-level email address and added to the Customer Sold To Email Address table. It also becomes the new primary email address for the customer if there is not already a primary.
   - If you remove the order email address, the system removes the order-level email address from the order; however, the address remains in the Customer Sold To Email Address table unless you delete it. You can use the Work with Customer Email Address Screen or the Select Customer Email Address Screen. **Note:** If you clear the email address and the *Suppress Email Address Search (J09)* system control value is selected, the system does not generate additional order--related emails for the order.

Update the Email Opt-In

1. Select a valid *Opt-In Status* setting from the **Email Opt-In** drop-down box.
2. Select the **Update** option.
3. The system returns you to the *Order Summary* page and displays a message indicating your changes have been saved.
   - You must select the **Unlock Order** option or press CTRL + ALT + u to accept all of the changes that you have made to the order.
   - When you change the opt-in/out flag in order maintenance, the system updates the **Opt in** setting in the Customer Sold To Email Address table for the email address that matches the order-level email address. If the order-level email address is the same as the customer's primary email address, the system also updates the **Opt in** setting for the sold-to customer. If there is no order-level email address, the system updates the **Opt-in** setting for the

customer's primary email address, and the matching address in the Customer Sold To Email table.

Update the Customer Class

> **Note:**
>
> This option is not currently implemented.

Update the Sales Representative

You can assign an active or inactive sales representative to an order.

1. Enter a valid sales representative in the *Sales Representative Number* field or select the prompt arrow next to the **Sales Representative Number** field to advance to the **Sales Representative Lookup** window where you can select a sales representative.
   The *Maintain Sales Rep # During Order Maintenance (B22)* secured feature controls whether you can update the **Sales Representative Number** field on the **Edit Additional Order Details** panel. If you do not have authority to this secured feature, the **Sales Representative Number** field is display-only on the **Edit Additional Order Details** panel. For orders that are in error at the header in a batch, displays invalid values passed in orders and allows you to select a valid value and update the order.

   To remove the sales representative, remove any text in the field.
2. At the **Sales Representative Lookup** window:
   - You can search for an active sales representative by **Sale Representative Number**, **Sales Representative Name**, and/or **Store Number**.
     – Enter a full or partial sales representative number in the **Sales Representative Number** field to display sales representatives whose sales representative number starts with your entry.
     – Enter a full or partial sales representative name in the **Sales Representative Name** field to display sales representatives whose name contains your entry.
     – Enter a full or partial store number in the **Store Number** field to display sales representatives whose store number starts with your entry.
   - You can sort on any column on this window by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.
   - Select the **Sales Representative Number** link for a sales representative to return to the **Edit Additional Order Details** panel; in this situation, the system displays the selected sales representative number in the **Sales Representative Number** field and displays the sales representative name below the field.
   - Select **Cancel** to return to the **Edit Additional Order Details** panel without selecting a sales representative; in this situation, the **Sales Representative Number** field remains unpopulated.
3. Select the **Update** option. The system validates your entry. An error message displays if:
   - The sales representative is invalid.
   - You remove the sales representative and the *Require Sales Rep # in Order Entry/ Order Maintenance (E87)* system control value is selected.

4. If the update is successful, the system returns you to the *Order Summary* page and displays a message indicating your changes have been saved.
    - You must select the **Unlock Order** option or press CTRL + ALT + u to accept all of the changes that you have made to the order.
    - When you update the salesrep:
        – The system updates sales reports based on your entry of a different sales representative number.
        – New items are booked to the new sales representative number.

> **Note:**
>
> The **Sales Representative** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Place the Order on User Hold

1. Select a hold reason from the *User Hold Reason* drop-down box. If the option is available, all existing hold reasons are displayed in alphabetical order by hold reason description.

    This option is available only if:
    - There is not currently a hold reason is assigned to the order as a user hold; if a user hold is assigned to the order, this field is display-only.
    - The order's current status is Open, Held, or Quote; however, if you assign a hold reason to an order with a status of Quote, you cannot unlock the order without adding a payment method.

    > **Note:**
    >
    > Oracle recommends that, when applying a hold reason to an order, you select only user holds, not hold reasons that can be assigned by the system. If you include the word "User" in the hold reason description when setting up user holds, these hold reasons will be easier to find and distinguish from system-assigned holds. See *Order Hold Reasons Overview* for more information, including a list of system-assigned hold reason codes.

2. Select the **Update** option.
3. If the update is successful, you return to the *Order Summary* page, and a message indicates that your changes have been saved.
    - You must select the **Unlock Order** option or press CTRL + ALT + u to accept all of the changes that you have made to the order.
    - If the order was not previously on hold, it is now placed on hold. If there are multiple ship-tos, they are all held.
    - The system writes an *Order Activity* message with an **Activity** of **Order Level Hold** and a **Description** of the hold reason description. This message is written regardless of whether the order was already on a system-assigned hold when you applied the user hold.

> **Note:**
>
> You can assign an order hold reason regardless of whether you have any additional authority related to releasing holds; see *Authority to Release Order Hold Reasons* for a discussion.

Releasing the order from the hold: Once a user hold is assigned to an order, you cannot change it at this panel; instead, you need to use the *Order Holds* window to release it.

Fields on Edit Order Details

Purpose: The following information displays on the **Edit Additional Order Details** panel.

- *Order Number*
- *Order Date*
- *Order Status*
- *Quote Origin*: The **Quote Origin** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Source*. The source code description is also displayed.
- *Alternate Order Number*
- *Entered By*
- **Date Entered** (*Entered Date*)
- *Origin (Order Type)*
- *Customer Class*: Required if the *Require Customer Class in OE, WCAT, and WCST (H85)* system control value is populated.
- *Order Email*
- **Email Opt-In** (*Opt-In Status*)
- *User Hold Reason*: Display-only if a user hold reason is currently assigned to the order. Optionally, select a user hold reason to assign the hold reason to the order, and put the order on hold if it is currently open. To release the order from the current user hold reason, use the *Order Holds* window.

  > **Note:**
  >
  > Oracle recommends that, when applying a hold reason to an order, you select only user holds, not hold reasons that can be assigned by the system. If you include the word "User" in the hold reason description when setting up user holds, these hold reasons will be easier to find and distinguish from system-assigned holds. See *Order Hold Reasons Overview* for more information, including a list of system-assigned hold reason codes.

- **Sales Representative Number** (*Sales Representative Name*): The **Sales Representative Number** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option. In addition, the **Sales Representative Number** field is display-only if you do not have authority to the *Maintain*

Sales Rep # During Order Maintenance (B22) secured feature. Optionally, click in the field to display a list of sales representatives, including their names, numbers, and store numbers. For orders that are in error at the header in a batch, displays invalid values passed in orders and allows you to select a valid value and update the order.

- *Sales Representative Store* You must have authority to the *Maintain Originating Store # During Order Maintenance (B23)* secured feature to change the Sales Representative Store on the Edit Additional Order Details window, otherwise the field display-only.

For more information:

- *Edit Additional Order Details* for an overview of the **Edit Additional Order Details** panel.
- *Edit Additional Order Details Options* for step-by-step instructions on the actions you can perform on the **Edit Additional Order Details** panel.

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Order Holds

Overview: Use the **Order Holds** window to review and work with the holds placed on an order.

How to display: Select the **Order Hold(s)**link in the **Order Status** tile in the upper right of the *Order Summary* page.

This window displays holds in the following order:

- system hold
- payment method hold
- ship-to hold
- user hold

In this topic:

- *Order Hold Reasons Overview*
  - *Assigning an Order Hold Reason to an Order*
  - *System-Level (Header) Holds*
  - *Ship-To Holds*
  - *Payment Method Holds*
  - *User-Defined Holds*
- *Authority to Release Order Hold Reasons*

For more information:

- *Order Holds Options* for step-by-step instructions on the actions you can perform on the **Order Holds** window.
- *Fields on Order Holds* for a description of the fields on the **Order Holds** window.

Order Hold Reasons Overview

Purpose: The system places orders on hold for a variety of reasons, most having to do with the credit checking process. The credit checking program executes automatically whenever you accept a new order or when you accept changes to an existing order.

Hold reason codes are defined in the Order Hold Reason Code table. You can create and work with order holds using the **Work with Order Hold Reason Codes (WOHR)** menu option. You need to verify that each system-assigned code exists in the Order Hold Reason Code table. Although the system assigns these codes to orders it places on hold, you will not be able to release the orders if the system does not find the appropriate code defined in the Order Hold Reason Code table.

You must release all holds on an order before the order can continue to process through the system. For example, if a multiple pay type order that includes a credit card and a check is placed on hold for credit card fraud and a time hold for the check, you must correct both conditions to release the order.

Assigning an Order Hold Reason to an Order

The system assigns order hold reason codes based on conditions that exist at the order header level and with certain pay types. You must establish fraud and hold criteria in the System Control table, Customer and Miscellaneous Fraud tables, Customer tables, and the Pay Type table.

You cannot modify or delete hold reason codes that the system assigns, although you can prevent their use in some cases by clearing the *Fraud Checking (A68)* system control value.

Each hold updates the order header table status to **H (Hold)**. The system checks for hold conditions and assigns holds at three levels:

- System (or header) level
- Ship-To level
- Payment Method level

An order can be on hold at all three levels at the same time, or just on system hold. There will always be a system hold when there is a Ship-To hold or a Payment Method hold.

The system looks for, and assigns, hold codes in the following order:

- Sold-To customer
- Bill-To customer, when the system does not place an order on Sold-To customer hold
- Ship-To customer
- Dollar amount, when the system does not place an order on Sold-To or Bill-To customer hold
- Payment Methods, regardless of system and Ship-To holds already placed on the order

System-Level (Header) Holds

Orders go on header-level holds for reasons at the Sold-To level, Bill-To level, dollar level, or if there is only a Ship-To or pay type hold. When any of the hold codes described below apply, the system updates the Order Header table with the system hold reason code.

- **AR (Declined Credit Card Reauthorization):** Assigned when the REAUTH periodic function attempts to reauthorize an expired authorization, and the reauthorization is declined. See *Releasing Orders from AR or AU Holds* for more information.
- **AT (Declined Credit Card Authorization)**: Assigned when the credit card the customer used for the order has been declined from authorization. The specific reason for the decline is identified by a code you define in the Authorization Service table.
- **AU (Broker Order Under Review):** Assigned when a status inquiry response message from the Order Broker indicates that the **Under Review** flag is selected for the retail pickup or delivery order. These status inquiry requests are generated

through pick slip generation and through the BROKER integration layer process, as well as when the order is created through the fulfillments response message. See *Releasing Orders from AR or AU Holds* for more information.

- **AV (Address Verification)**: Assigned when the authorization sends a code that has not been defined as a vendor response code through the **Work with Authorization Services (WASV)** menu option.
- **BD (Balance Due)**: Assigned when the order is paid with a prepaid pay type (pay category Cash/Check) and the amount of the short payment is greater than the dollar amount or percentage specified in the Pay Type table. If both a dollar amount and a percentage are defined for the pay type, then the system checks the dollar limit first to determine whether to apply the hold reason. The system writes balance due amounts to the refund/credit subsystem for manual review and write-off. If you apply sufficient additional payment to the order, the system releases the order from a balance due hold automatically.
- **BF (Bill To Fraud)**: Assigned when:
  - You enter **Fraud** in the **Hold/bypass/fraud** field of the Bill To Customer table for the customer or
  - The system finds a match on the standard match code or one of three fraud match codes in the Customer Fraud table.
- **BU (Bill To Unconditional Hold)**: Assigned when you enter **Hold** in the **Hold/bypass/fraud** field in the Bill To Customer table for the customer.
- **CB (Customer Rejected Deposit/Credit Card)**: Assigned when the system finds a match to the order's credit card on a rejected deposit associated with a deferred or installment payment plan. When an order is placed on **CB** hold, the system writes an order transaction history message indicating the order has been placed on hold.
- **DH (Dollar Hold)**: Assigned when:
  - You defined a maximum order total in the *Maximum Order Amount (A92)* system control value, and
  - The order total exceeds this value, and
  - The system detects no hold conditions at the Sold-To, Bill-To, or Ship-To level, and
  - The order is not an e-commerce order that exceeds the *Maximum Order Amount for E-Commerce Orders (H54)* system control value.
- **EH (E-Commerce Dollar Hold)**: Assigned when:
  - You defined a maximum order total in the *Maximum Order Amount for E-Commerce Orders (H54)* system control value, and
  - You also defined a maximum order total in the *Maximum Order Amount (A92)* system control value, and
  - The e-commerce (order API) order total exceeds the value in the *Maximum Order Amount for E-Commerce Orders (H54)* system control value, and
  - The system detects no hold conditions at the Sold-To, Bill-To, or Ship-To level.
  - The system identifies an e-commerce order if the order type matches the *E-Commerce Order Type (G42)* system control value or if the **Internet order** flag in the Order Header table is set to **I**. The order API sets this flag to **I** when it creates an order.

- **EO (Email Fraud Hold)**: Assigned when the bill-to customer or sold-to customer has an email address that matches an email address in the Miscellaneous Fraud table (**Work with Miscellaneous Frauds (WMFF)**), or the order-level email matches.
- **FC (Fraud Cancellation Hold)**: Assigned when the Cybersource Decision Manager Update Process retrieved order information from Decision Manager for orders that were marked as review during the Cybersource Decision Manager Review Process and the new decision assigned to the order is REJECT, indicating a user in Decision Manager reviewed the order and rejected the order. In this situation, the system places the order on **FC** Fraud Cancellation hold if the entire order cannot be canceled.
- **FS (Fraud Scoring Hold)**: Assigned when the online authorization transaction sent to Cybersource for the credit card payment on the order was evaluated by Cybersource Decision Manager Fraud Scoring, and based on the order profile, requires review for possible fraud.
- **GC (Gift Card Hold)**: Assigned when the order contains a gift card item and a gift card payment method. The system evaluates this hold only if the *Use Gift Card Fraud Checking (L72)* system control value is selected.
- **IP (IP Address Hold)**: Assigned when the **ip_addr** in the Inbound Order XML Message (CWORDERIN) (when creating an order through the generic order API) matched an IP address in the Miscellaneous Fraud table (**Work with Miscellaneous Frauds (WMFF)** menu option).
- **PT (Pay Type)**: Assigned when the order is on pay type hold and no other hold exists. The system places the order pay type on hold, but displays **PT** at the header level to let you know that you need to investigate and release the pay type record.
- **RL (Customer Engagement Communication Failure)**: Assigned during the order accept process, the system could not connect with Customer Engagement to redeem the award amount applied to an order. When an order is placed on **RL** hold, the system writes an order transaction history message indicating the award amount was not automatically redeemed so a user can log in to Customer Engagement and manually redeem the award amount against the loyalty card: `SYSTEM UPDATE Loyalty Award Redemption Failed 99.99`, where `99.99` is the award amount applied to the order.
- **SB (Customer Rejected Deposit/Customer Fraud)**: Assigned when the system finds a match to the order's sold to customer on a rejected deposit associated with a deferred or installment payment plan. When an order is placed on **SB** hold, the system writes an order transaction history message indicating the order has been placed on hold.
- **SF (Sold-To Fraud)**: Assigned when:
  - You enter **Fraud** in **Hold/bypass/fraud** field in the Sold To Customer table for the customer, or
  - The system finds a match on the standard match code or one of three fraud match codes in the Customer Fraud table (**Work with Customer Fraud Tables (WCFD)** menu option).
  - The system also sets a ship-to hold of **HS**.
- **SH (Ship-To Hold)**: The order is on Ship-To hold only. The system places the Ship-To record on hold, but displays **SH** at the header level to let you know that you need to investigate and release a Ship-To record.

- **SM (Ship-to Mismatch)**: Assigned when:
  - The order contains a **Credit Card** pay category payment method, and
  - The ship-to address on the order is different from the sold to address, and
  - The order total is greater than the *Maximum Order Amount for Fraud Checking (D24)*, and
  - The ship via priority for the ship via on the order header matches the *Ship Via Priority for Ship To Mismatch (L71)*, and
  - The number of times shipped to the address is less than the *# of Times Shipped to Same Address (D25)* OR the number of days since the last shipment to the address is less than the *# of Days Since Last Order (D26)*.
- **SU (Sold To Unconditional)**: Assigned when you enter **Hold** in the **Hold/bypass/fraud** in the Sold To Customer table for the customer.
- **UB (Unreferenced Bill-To)**: Assigned when you create a new bill-to customer through Order Entry. The system assigns this hold reason only if the *Allow Order for New Bill-to Without Order Hold (D84)* system control value is unselected. This header level hold occurs prior to credit checking.
- **VD (Void Pick)**: Assigned when a pick slip for the order is voided through the Void/Reprint pick function by selecting **Void All/Hold Order**. You must release the order through the **Release Held Orders (ERHO)** menu option, not through order maintenance. Although this type of hold is not applied during the credit checking process, it has been described here because it is a system-level hold.
- **WO (Warranty Order Hold)**: Assigned when the cost for all of the warranty items on an order exceeds the amount defined in the *Maximum Warranty Order Amount (F97)* system control value. If the cost was overridden on the order detail line, the system uses the cost override.
- **WC (Warranty Customer Hold)**: Assigned when the **Life to date warranty dollars** field on the Work with Customer Warranty Information Screen for the sold to customer exceeds the amount defined in the *Maximum LTD Warranty Amount for Customer (F98)* system control value. The system uses this calculation to update the **Life to date warranty dollars** field:

  ```
  warranty shipped amount - warranty returned amount = life to date
  warranty dollars amount
  ```
- **ZB (Bill To Zip Fraud)**: The postal code on the Bill-To address matches a postal code in the Miscellaneous Fraud table.
- **ZS (Sold To Zip Code Fraud)**: The postal code on the Sold-To address matches a postal code in the Miscellaneous Fraud table.

Ship-To Holds

The system continues searching for hold conditions at the Ship-To level. When a hold occurs at the Ship-To level, the system updates the Ship-To order reason and status with one of the codes discussed below. The following code applies when there is only a Sold-To customer on the order.

- **ES (Email Ship-To Fraud)**: Assigned when the shipping address on the order has an email address that matches an email address in the Miscellaneous Fraud table; the match can be a recipient, a permanent ship-to, or an order ship-to. **Note:** The system puts the order on hold only if the customer’s primary email address matches the email address in the Miscellaneous Fraud table.

- **HF (Ship To Fraud)**: Applies to a permanent Ship-To on an order when the system locates a match on the standard match code or on a fraud match code in the Fraud table (**Work with Customer Fraud Tables (WCFD)** menu option).
- **HS (Ship To/Sold To Fraud)**: Assigned when the ship-to address on the order matches an address in the Fraud table (**Work with Customer Fraud Tables (WCFD)** menu option). This is a secondary hold applied if a sold-to fraud (**SF**) occurs. Also, the system assigns this hold reason code if you have not set up all four of the match code types through the **Work with Match Codes (MMCH)** menu option.
- **ZH (Ship To Zip Fraud)**: Assigned when the postal code on the Ship-To address matches a postal code in the Miscellaneous Fraud table (**Work with Miscellaneous Frauds (WMFF)** menu option).

> **Note:**
>
> The **HF** or **ZH** hold codes may apply when the Ship-To and Sold-To customers differ (that is, when the order includes a permanent or one-time shipping address).

Payment Method Holds

The system checks for payment method holds, regardless of any other order holds. The payment methods used on the order control how the system performs the credit check routines.

Prepaid (Cash/Check) Payment Method Holds

Prepaid orders are orders paid by cash or check.

- **TM (Time hold)**: Assigned when you specify a time period in the Pay Type table (**Work with Pay Types (WPAY)** menu option). For example, you may decide to hold a customer's check for a specified number of days, so that you are sure that the check clears. The hold remains in effect until the time period elapses or until you release the order from hold manually through the **Release Held Orders program (ERHO)** menu option. The system places all recipient orders on time hold if the order uses multiple payment methods or has multiple recipients.
- **KF (Check fraud)**: Assigned when the system checks orders against the Miscellaneous Fraud table, and the micra number (routing number, located on the bottom of the check) is in the Miscellaneous Fraud table (**Work with Miscellaneous Frauds (WMFF)** menu option).

Credit Card Payment Method Holds

- **CW (Waiting for Credit Card Authorization)**: Assigned when orders are waiting for authorization from a credit card service bureau. If the only hold on the order is **CW**, then the order does not actually go on hold. Instead, the order continues its normal routing process. The order displays **CW** as the payment status, but the order is open. The system authorizes the amount to be shipped during Pick Slip Generation. If the service bureau declines the order at this point, then the order may go on hold, depending on the reason for the decline.

> **Note:**
>
> The CW hold reason is not displayed at the *Order Holds* window or the *Manage Held Orders* or *Held Order Summary* pages. You cannot release this hold reason.

When the service bureau declines the credit card charge, the system checks the Vendor Authorization table to determine if a hold code exists for the decline reason. If the **Hold reason** field in the Vendor Response record is blank, the system will not place the order on a declined authorization hold. Instead, it assigns **AV** as a hold reason at the header level of the order to remind you that the order is waiting to be resubmitted for authorization.

If the Vendor Response record includes a hold reason code for the declined reason, then the system places the pay type on hold using the hold reason code in the Vendor Response record, and assigns a code of **AT** to the order header.

Example:

The service bureau gives you the following reasons for declining authorization:

01 = Card stolen

02 = Unable to reach bank

You create a record for each reason in the Vendor Authorization table, entering **XY** in the **Hold reason** field as a code for “card stolen,” and leaving the **Hold reason** field blank for “unable to reach bank.”

Scenario 1: The service bureau declines a credit card charge, returning 01 (card stolen) as the reason for the decline. The system:

1. Checks the Vendor Response record for response code 01 and finds **XY** in the **Hold reason** field.

2. Places the order on hold, assigning **AT** (Authorization declined) to the order header.

3. Places the pay type on hold, assigning **XY** to the pay type.

Scenario 2: The bank's phone line is busy when the service bureau tries to authorize the credit card charge. The service bureau returns code 02 (unable to reach bank) as the reason. The system:

1. Checks the Vendor Authorization table for response reason code 02 and finds no code in the **Hold reason** field.

2. Leaves **CW** at the pay type level, indicating that the order will be automatically resubmitted for authorization.

- **PV (Pay Plan Velocity Hold)**: Assigned when a credit card has been used too many times within a specified period for an order containing a deferred or installment payment plan. The system determines when to place an order on **PV** pay type hold based on the values defined in the:
  - *Number of Times Flexible Payment Option is Used (F52)* system control value. This system control value defines the number of times a credit card can be used before an order containing a deferred or installment payment plan is placed on **PV** hold. **Example:** If you enter **2** in the *Number of Times Flexible Payment Option is Used (F52)* system control value, the system will place an order on **PV** hold if the credit card has been used on more than 2 orders containing a deferred or installment payment plan.

  - *Number of Days Flexible Payment Option is Used (F53)* system control value. This system control value defines the number of days this credit card can be used before an order is placed on hold. The system only determines the number of days a credit card can be used before its next use on an order containing a deferred or installment payment plan if the credit card exceeded the number of days defined in the *Number of Times Flexible Payment Option is Used (F52)* system control value.

    Example: If you entered **2** in the *Number of Times Flexible Payment Option is Used (F52)* system control value and the credit card was used on more than 2 orders containing a deferred or installment payment plan, the system would then determine the last time the credit card was used. If you entered **5** in the *Number of Days Flexible Payment Option is Used (F53)* system control value, the system would place the order on **PV** hold if the credit card was used on more than 2 orders containing a deferred or installment payment plan and the credit card was used less than 5 days ago.

- **P$ (Pay plan Dollar Threshold)**: Assigned when the total dollar amount and invoice amount outstanding for a sold to customer on orders containing a deferred or installment payment plan exceeds the dollar amount defined in the *Dollar Threshold for Sold To Customer Orders with Flexible Payments (F54)* system control value. The system uses this calculation to determine the total dollar amount outstanding for a sold to customer on orders containing a deferred or installment payment plan:

  ```
  balance open amount + open invoice amount = total
  outstanding dollar amount
  ```

  Example:

  Dollar threshold amount = 100.00

  balance open amount = 75.00

  open invoice amount = 50.00

  75.00 + 50.00 = 125.00 (total outstanding dollar amount)

  Since the total outstanding dollar amount is greater than the dollar threshold amount defined in the *Dollar Threshold for Sold To Customer Orders with Flexible Payments (F54)* system control value, the system places the order on **P$** hold.

- **Pay Type Hold**

  When all pay types are deactivated you won't be able to release the order from hold until a valid pay type is entered or the order is cancelled. You cannot unlock the order. You must enter a valid pay type to release the order from hold, or cancel the order. If you try to edit the order and a valid pay type is not entered, you should close the browser then use the Unlock Order (MULO) menu option to unlock the order.

User-Defined Holds

Most of the hold reason codes the system assigns revolve around issues of suspicious credit. However, you can also create your own hold reason codes for other business reasons in the **Work with Order Hold Reason Codes (WOHR)** menu option.

A user-defined hold reason displays for a payment method if, for example, the payment method was declined by the authorization service and you associated the vendor response with a unique pay type hold reason.

You can also assign a hold reason to the order, changing the order status to Held if it was previously Open. See *Place the Order on User Hold*.

Authority to Release Order Hold Reasons

Purpose: The system uses the following hierarchy to check for a user's authority to release an order from hold through the *Order Holds* window.

1. User's authority to the **Release Held Order (ERHO)** menu option: full *ALLOW authority is required to release all holds except for user holds.
2. User's authority to the specific order hold reason as defined in the **Work with Order Hold Reason Codes (WOHR)** menu option.
3. User's user class authority to the specific order hold reason as defined in the **Work with Order Hold Reason Codes (WOHR)** menu option.
4. User's authority to the *Order Hold Reason Release Authority (A77)* secured feature as defined in the **Work with Users (WUSR)** menu option.
5. User's user class authority to the *Order Hold Reason Release Authority (A77)* secured feature as defined in the **Work with User Classes (WUCL)** menu option.
6. Default setting of the *Order Hold Reason Release Authority (A77)* secured feature as defined in the **Work with System Values/Features (WSYS)** menu option.

The system checks each setting in the above order, skipping over any blank settings until it finds a *ALLOW or *EXCLUDE setting.

Example One: USER1 is assigned to the user class WAREHOUSE. The *Order Hold Reason Release Authority (A77)* secured feature is set to *ALLOW. The WAREHOUSE user class authority for order hold reason **UH** is set to *EXCLUDE. USER1's user authority for order hold reason **UH** is set to *ALLOW. The result is that USER1 can release orders from **UH** hold, because her user authority overrides the other settings. However, the other users in the WAREHOUSE user class cannot release orders from **UH** hold, unless they also have an override at the user level.

Example Two: USER2 has a *Order Hold Reason Release Authority (A77)* secured feature setting of *EXCLUDE. However, the user settings for the **AA** and **BB** hold reason codes only are set to *ALLOW. This user is not assigned to a user class. The result is that USER2 can release orders from **AA** and **BB** hold only, but is excluded from releasing an order with any other hold reason code.

What if the hold reason is not defined in Work with Order Hold Reason Codes (WOHR)? If the system put an order on hold with a hold reason code that was not defined in Work with Order Hold Reason Codes (WOHR), you can release the hold provided you have authority to the *Order Hold Reason Release Authority (A77)* secured feature. In this situation, authority to the **Release Held Order (ERHO)** is not required.

Order Holds Options

Purpose: You can perform the following actions on the **Order Holds** window.

- *Release the Order from All Holds*
- *Release the Order from One or More Individual Holds*
- *Release Orders from AR or AU Holds*

Store pickup order? You can use this window to release a store pickup order from hold, as well as canceling it; however, other updates, such as adding an order line, are not available.

For more information:

- *Order Holds* for an overview of the **Order Holds** window.
- *Fields on Order Holds* for a description of the fields on the **Order Holds** window.

Release the Order from All Holds

1. Select the **Select All** option and then select **Release Holds**. The **Select All** option is available only if:
   - You have ALLOW authority to the Release Held Order (ERHO) menu option, and
   - You have authority to the *Order Hold Reason Release Authority (A77)* secured feature, and
   - You have authority to release each individual hold assigned to the order, and
   - The order is not locked by another user, the system, or a different session.
   - The order does not have a hold reason of **AR** or **AU** assigned by the system. See *Order Hold Reasons Overview* for more information.

   User holds: Even if you do not have ALLOW authority to the Release Held Order (ERHO) menu option, you can still release an order from a user hold provided you have authority to the *Order Hold Reason Release Authority (A77)* secured feature, and are not restricted from the specific hold reason code.

   See *Authority to Release Order Hold Reasons*.
2. The system verifies that the order is eligible for release. An error message indicates if you do not have authority to release the order from all holds.
3. If the release is successful, the system:
   - Locks the order.
   - Releases the order from all order holds (system hold, ship-to hold, payment hold, and user hold).
   - Places the credit card payment on **CW Waiting for Credit Card Authorization** hold if you release the credit card payment from hold, the payment has an authorization service code defined, and the credit card requires authorization. If the only hold on the order is **CW**, the order does not actually go on hold. Instead, the order continues its normal routing process. The order displays **CW** as the pay type status, but the order is open. The system authorizes the shipment amount during Pick Slip Generation. If the service bureau declines the order at this point, then the order may go on hold, depending on the reason for the decline.
   - Clears the holds displayed on the **Order Holds** window.
   - Displays a confirmation message indicating the order has been released from all order holds.
   - Evaluates the order to determine if it should be placed on a different hold.
   - Creates an order transaction history message indicating the order was released from hold.

- Closes the HO tickler related to the order, if any, and creates a tickler history record as well as an order transaction history message.
- Determines whether the order is eligible for pick slip preparation.
- If the *Send Held Orders to OROB (M18)* system control value is selected and the order was previously sent to Order Orchestration with the **Under Review** flag selected, generates an order status request to Order Orchestration to clear the **Under Review** flag.

Note: See *Releasing Orders from AR or AU Holds* for information on when you cannot release an order from hold because it was sent to Order Orchestration.

If the *Send Held Orders to OROB (M18)* system control value is not selected and the order requires fulfilling through Order Orchestration, but was not previously sent, it is now eligible to be sent.

> **Note:**
>
> When you release an order from all holds, any orders lines that are in **Held** status will remain in held status.

Release the Order from One or More Individual Holds

An error message indicates if the order is currently locked. See *Unlock Order* for background on unlocking orders. Also, see the discussion of when you can't release an order from hold under *Order Holds Options*.

1. Select the check box for a specific hold assigned to the order to release it from the hold, or select the check box for each hold reason that you would like to release on the order.

   The check box is available for a hold reason only if:

   - You have ALLOW authority to the Release Held Order (ERHO) menu option, and
   - You have authority to the *Order Hold Reason Release Authority (A77)* secured feature, and
   - You have authority to the specific hold reason as defined in the **Work with Order Hold Reason Codes (WOHR)** menu option, and
   - The order is not locked by another user, the system, or a different session.
   - The order does not have a hold reason of **AR** or **AU** assigned by the system. See *Order Hold Reasons Overview* for more information.
   - The order does not have a hold reason when the only pay types on the order are deactivated (usually as a result of a Reject from CyberSource Fraud Scoring). To release the order from the hold, you must enter a valid pay type or cancel the order.

   User holds: Even if you do not have ALLOW authority to the Release Held Order (ERHO) menu option, you can still release an order from a user hold provided you have authority to the *Order Hold Reason Release Authority (A77)* secured feature, and are not restricted from the specific hold reason code.

   See *Authority to Release Order Hold Reasons*.
2. Select **Release Holds**.
3. If the release is successful, the system:
   - Locks the order.

- Releases the order from the specified hold(s).
- Closes the **Order Holds** window.
- Displays a confirmation message indicating the order has been released from the selected hold(s).
- Evaluates the order to determine if it should be placed on a different hold.
- Determines whether the order is eligible for pick slip preparation.
- If this is the only hold reason assigned to the order and If the *Send Held Orders to OROB (M18)* system control value is selected and the order was previously sent to Order Orchestration with the **Under Review** flag selected, generates an order status request to Order Orchestration to clear the **Under Review** flag.
- If the *Send Held Orders to OROB (M18)* system control value is not selected and the order requires fulfilling through Order Orchestration, but was not previously sent, it is now eligible to be sent.
- Creates an order transaction history message indicating the order was released from hold.
- If you released the ship-to hold on an order with multiple ship-tos, all the ship-to holds are also released. A separate Order Activity record is written for each ship-to released from hold, with the ship-to number indicated for each. The activity record for the ship-to only hold release is written for ship-to 1.

See *Release the Order from All Holds*, above, for additional updates that take place if there are no additional holds on the order.

Release Orders from AR or AU Holds

Restrictions: Orders on **AR** (Declined Credit Card Authorization) or **AU** (Broker Order Under Review) system holds can be released only under the following conditions:

- **AR:** You cannot release an order on **AR** system hold unless the order has a valid authorization for the balance of the order. Otherwise, you can cancel the order.
- **AU:** You cannot release an order on **AU** hold through a screen in Classic or Modern View. Instead, based on the response received from Order Orchestration through the BROKER integration layer process, the **AU** hold is removed automatically if the response indicates that the order is no longer under review. Also, the order can be canceled based on the response received through the BROKER process.

See **Reauthorizing Expired Authorizations** in the Classic View online help for a discussion of how these hold reasons are applied and more information.

Fields on Order Holds

Purpose: The **Order Holds** window displays the following information.

- A warning messages indicates if you cannot release holds because the order is locked, and indicates the name of the user or process that has the order locked. See *Unlock Order* for more information.
- **Hold Icon** (an icon to the left of the **Hold Description**): The icon represents the type of hold assigned to the order.

  - System hold: A gear icon ( ) indicates if the order is on system hold.
  - Ship-To hold: A shipper icon ( ) indicates if a ship-to on the order is on ship-to hold. In this case, the ship-to number is also indicated, for example, **Ship To 3**.
  - Payment hold: A currency icon ( ) indicates if a payment on the order is on payment hold. For a payment hold, the payment method description and last 4 positions of the credit card are displayed to the right.
  - User hold: A person icon ( ) indicates if the order is on user hold.
- *Hold Reason*: Unlabeled field to the right of the **Hold Icon.**
  - For a ship-to hold, the ship-to number is indicated to the right.
  - For a payment hold, the payment method description and last 4 positions of the credit card are indicated to the right.
- *Hold Type* (unlabeled field below the Hold Description)

> **Note:**
>
> No hold reason or hold type is displayed if a system-assigned hold reason on the order has not been set up in the **Work with Order Hold Reason Codes (WOHR)** menu option. In this situation, the window might indicate both that you do not have authority to release the order and that there is no hold information to display. Use Classic View to review the order hold reason and create the hold reason code to resolve the issue.
>
> The Awaiting Credit Card Auth (CW) hold reason is not listed.

-

For more information:

- *Order Holds* for an overview of the **Order Holds** window.
- *Order Holds Options* for step-by-step instructions on the actions you can perform on the **Order Holds** window.

23
Cancel Ship-To

Purpose: Use the **Cancel** window to cancel a ship-to order. The system frees up any reserved inventory on the canceled order and makes it available to other orders.

How to display: Select the **Cancel** option above the **Ship-To Details** panel of the *Order Summary* page.

The **Cancel** option is available only if:

- The order is in an Open or Held status, and is not locked by another user, and
- You have authority to the **Enter/Maintain Orders (OEOM)** menu option, and
- The order is not a quote and
- The order is not in error status

In addition, if the order includes a brokered backorder line, is from Order Orchestration (delivery or pickup), or is a store pickup order, you must have authority to the *Cancel Order Broker Lines (B19)* secured feature.

In this topic:

- *Canceling Brokered Orders*
  - *Cancel Order Broker Lines (B19) Secured Feature*
  - *Canceling a Brokered Backorder Request*
  - *Canceling an Order Received from Order Orchestration*
  - *Canceling a Store Pickup Order*
- *Cancellation Updates*
  - *Cancellation Updates when the Cancel Reason Reduces Demand*
  - *Cancellation Updates when the Cancel Reason Does Not Reduce Demand*
  - *Cancellation Email*
- *Reopening a Canceled Order*

For more information:

- *Cancel Ship-To Options* for step-by-step instructions on the actions you can perform on the **Cancel Ship-To** window.
- *Fields on Cancel Ship-To* for a description of the fields on the **Cancel Ship-To** window.

Canceling Brokered Orders

Cancel Order Broker Lines (B19) Secured Feature

The *Cancel Order Broker Lines (B19)* secured feature controls the ability to cancel backordered lines that are assigned to the Order Orchestration for fulfillment (brokered backorders), are from Order Orchestration (delivery or pickup) or are store pickup orders.

> **Note:**
>
> The *Cancel Order Broker Lines (B19)* secured feature does not control authority to ship-for-pickup orders.

Canceling a Brokered Backorder Request

When you cancel a ship-to order that contains a brokered backorder request, the system cancels both the brokered backorder request and the order line itself.

> **Note:**
>
> - Before canceling a brokered backorder request, it is important to confirm that the assigned fulfilling location is not in the process of shipping it. Even if the current status indicates that the order is not in the process of fulfillment, depending on the setting of the *Order Broker Status Update Interval (K10)* system control value, this information could be out of date.
> - If the *Use OROB for Fulfillment Assignment (M31)* system control value is selected you can cancel the delivery order that was created to fulfill the originating broker backorder. In this situation, the system changes the Order Broker record's status to Canceled and sends a status inquiry request to the Order Broker.
> - *If you broker ship-for-pickup orders for fulfillment assignment (the Use OROB for Ship for Pickup Fulfillment Assignment (M34) system control value is set to* ***ALWAYS*** *and the Send B/O to OROB (K08) system control value is selected), when you cancel a ship-for-pickup order, the system sends an update to Order Orchestration so that the order can be updated to canceled.* In addition, if an order is created in Order Administration to fulfill the ship-for-pickup order, when you run pick slip generation for the pickup order, the system does not generate a pick slip and assigns the hold reason defined in the *Order Broker Hold Reason (Cancel) (L02)* system control value to the order. The system also writes an order transaction history message for the pickup order: `Order held - line(s) canceled in Order Orchestration`.

Canceling an Order Received from Order Orchestration

If you cancel an order received from Order Orchestration (delivery or pickup), the system changes the Order Orchestration record's status to `Canceled` and sends a status inquiry request to the Order Broker. If the order's status in Order Orchestration is:

- Canceled: The system does not send a status update to Order Orchestration; otherwise,
- If the order's status in Order Orchestration is anything but `Canceled`, the system sends a status update to Order Orchestration indicating the order was Rejected. In this situation, if Order Orchestration is configured to "reshop" the order and there are any other possible fulfilling locations, the Order Broker reassigns the order to the next possible location based on the fulfillment rules set up in Order

Orchestration, and the order returns to new order status; otherwise, if Order Orchestration cannot "reshop" the order, the order is assigned to the *OROB Default Location Code for Unfulfillable Orders (K56)*, and the order status is unfulfillable.

You cannot cancel a partial quantity on an order line received from Order Orchestration.

> **Note:**
>
> Although the system does not prevent you from canceling an order from Order Orchestration, some business processes require that only the originating location can cancel an order. In this situation, if the customer contacts the contact center to cancel the order, the operator notifies the originating store location and requests that the store perform the cancellation and trigger the status update to Order Orchestration. Using this process, the system receives notification of the cancellation the next time it sends a periodic status inquiry on the order to Order Orchestration, and then holds the entire order (even if only one line was canceled) using the *Order Broker Hold Reason (Cancel) (L02)*.

Voiding a Pick Slip for an Order Received from Order Orchestration

If the *Cancel Reason (Pick In) (L86)* system control value specifies a valid cancel reason and you use the generic pick in API to void a pick slip for an order from Order Orchestration (delivery or pickup), then the system cancels the order and sends a status update to Order Orchestration to reject the order. Otherwise, if the system control value is blank, you need to use order maintenance to cancel the order and send the status update to Order Orchestration.

Canceling a Store Pickup Order

Hold reasons removed: When you cancel a store pickup order, the system removes the hold reason(s), if any, on the order.

Notification to Order Orchestration: After you cancel a store pickup order, the system changes the Order Broker record's status to `Pending Cancel`, and then to `Canceled` once it has sent the status update message to Order Orchestration and received the response. The status update includes the cancel reason you entered. When it processes the response, the system writes Order Transaction History messages indicating the order was maintained and canceled.

The BROKER process in the **Work with Integration Layer Processes (IJCT)** menu option uses its **Outbound delay time** to determine how often to "wake up" and start evaluating Order Orchestration records. If it finds an order in `Pending Cancel` status, it generates the status update immediately and does not wait for the entire *Order Broker Status Update Interval (K10)*.

Example: The **Outbound delay time** for the BROKER process is 60 seconds. When you start the process, it sends status updates for any orders in `Pending Cancel` status, then evaluates whether to send any other request messages based on the **Order Broker Status Update Interval (K10)**. Once it has evaluated all orders in all companies, it then waits 60 seconds before restarting the process of checking for orders in `Pending Cancel` status and evaluating whether to send inquiry request messages for orders in other statuses.

The system does not verify the pickup order's current status in Order Orchestration before processing the cancellation.

Receiving a Store Pickup Cancellation from Order Orchestration

If the customer cancels the order, or an item on the order, at a retail location, the system receives the cancel status update when it sends a periodic status inquiry request and receives the response. In this situation, the system cancels the order or item using the *Cancel Reason (Rejected Store Pickup Orders) (G11)*; also, it writes an Order Transaction History message indicating the order was maintained and the web cancel request was processed. A line-specific message is also written for each canceled line on the store pickup order.

- The *Cancel Reason (Rejected Store Pickup Orders) (G11)* system control value must specify a valid cancel reason in order to correctly cancel an order or item based on messages received from Order Orchestration.
- Canceling individual lines is supported only if the *Use Split Order (L56)* system control value is selected, and the corresponding preference is selected in Order Orchestration.

Cancellation Updates

Purpose: The system performs the following updates when you cancel a ship-to order.

Cancellation Updates when the Cancel Reason Reduces Demand

The system performs the following updates if the selected cancel reason reduces demand.

- Sets the order status to Closed.
- Sets the order line status to Closed. **Note:** Any lines that were previously sold out remain in a sold out status.
- Reduces the quantity ordered by the quantity canceled. 0 displays if the entire line was canceled.
- Does not update the quantity canceled.

Cancellation Updates when the Cancel Reason Does Not Reduce Demand

The system performs the following updates if the selected cancel reason reduces demand.

- Sets the order status to Canceled if you cancel the entire order; otherwise, the order status is set to Closed if part of the order has already shipped or was sold out.
- Sets the order line status to Canceled if you cancel the entire order; otherwise, the order line status is set to Closed if all or part of the order line has already shipped. **Note:** Any lines that were previously sold out remain in a sold out status.
- Does not update the quantity ordered.
- Updates the quantity canceled with the canceled quantity.

Cancellation Email

The system generates an order cancellation email or Outbound Email XML Message (CWEmailOut) to the customer if:

- You have specified a program in the *Order Cancellation Email Program (K78)* system control value, and
- There have not been any shipments on the order, and
- The cancel reason code you use does not match the code in the *Cancel Reason Code to Suppress Email (L08)* system control value, and
- The customer is eligible to receive email notifications. For an order cancellation:
  – The **Email notification** field for the *Origin (Order Type)* on the order must be selected, and
  – The **Send email** flag is selected for the Order Cancel notification type on the Order Type Email Selection screen in the **Work with Order Types (WOTY)** menu option, and
  – The *Opt-In Status* for the email address on the order is set to **Email order and promotion information** or **Email order information only**.

> **Note:**
>
> If there have been any shipments on the order, the system generates the order line cancellation email even if all the remaining order lines are now canceled.

Reopening a Canceled Order

A canceled order remains on the system for inquiry purposes; you can reopen a canceled order by adding a new item to the order.

You cannot update a canceled line.

Cancel Ship-To Options

Purpose: You can perform the following actions on the **Cancel Ship-To** window.

- *Process Order Ship-To Cancellation*

For more information:

- *Cancel Ship-To* for an overview of the **Cancel Ship-To** window.
- *Fields on Cancel Ship-To* for a description of the fields on the **Cancel Ship-To** window.

Process Order Ship-To Cancellation

1. Select a cancel reason from the *Cancel Reason* drop-down field.
2. Select the **Submit Cancellation** option. If the order was not previously locked, the system locks it when you select this option.
3. The system validates that the ship-to order is eligible for cancellation.

   If the order has printed pick slips, a message displays indicating that the ship-to order cannot be canceled until the pick slips are voided. In this situation, you must close the **Cancel Ship-To** window and void the pick slips in Classic View.

   If the order is a quote, a message displays indicating that quotes are not eligible for cancellation. In this situation, you must close the **Cancel Ship-To** window.

4. If the ship-to order is eligible for cancel, the system returns you to the **Order Summary** page and displays a message indicating the ship-to order has been canceled.
5. Unlock the order when you are done. The system does not automatically unlock the order.

> **Note:**
>
> The system performs an order ship-to cancellation synchronously, regardless of the setting of the **Submit O/M Cancel Asynchronously (M36)** system control value.

For more information: See:

- *Cancellation Updates* for more information on the updates the occur when you cancel an order.
- *Canceling Brokered Orders* for more information on canceling a brokered order.
- *Reopening a Canceled Order* for more information on reopening a canceled order.

Fields on Cancel Ship-To

Purpose: The following information displays on the:

- Cancel Store Pickup window if it's a store pickup store order
- Cancel Ship for Pickup window if its a ship for pickup store order
- Cancel Ship-To <ship-to number> window if its a delivery order
- *Ship-To Number* (unlabeled field in the window title)
- *Cancel Reason*

For more information:

- *Cancel Ship-To* for an overview of the **Cancel** window.
- *Cancel Ship-To Options* for step-by-step instructions on the actions you can perform on the **Cancel** window.

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Edit Order Ship-To Address

Overview: Use the **Edit Order Ship-To Address** panel to review and update the shipping address for an order.

> **Note:**
>
> The order ship-to address available for edit at this panel is a one-time ship-to that is linked to the current order only and is stored in the Order Ship To Address table; no secondary customer record is filed with this address to use on future orders. Even if the order was originally created with a permanent ship-to associated with the customer record, or the shipping address is a separate existing customer record, updating the ship-to here does not update either of those customer records; only the ship-to for this order is updated.

Shipping restrictions: If one or more items on the order are restricted from being shipped to the state or country of the ship-to address you enter, you cannot attach the new address to the order. You can create and work with item restrictions by country/state using the Work with Item Restriction by Country/State screen in the **Work with Items/SKU's (MITM)** menu option.

Customer Engagement customer integration: A one-time shipping address is not included in the information that the system sends to Customer Engagement when you use the Customer Engagement customer integration.

How to display: Select the **Edit** option in the *Ship-To Address Panel* on the *Order Summary* page.

> **Note:**
>
> You cannot edit the order ship-to address if the *Ship-To Status* is **Closed** or if the *Broker Delivery Type* for the order is **Store Pickup** or **Ship for Pickup**.

When you advance to this panel, the system locks the order.

Authority: In order to advance to the **Edit Order Ship-To Address** panel, you must have authority to the **Enter/Maintain Orders (OEOM)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option; you can define menu option authority for a user class in the **Work with User Classes (WUCL)** menu option.

For more information:

- *Edit Order Ship-To Address Options* for step-by-step instructions on the actions you can perform on the **Edit Order Ship-To Address** panel.
- *Fields on Edit Order Ship-To Address* for a description of the fields on the **Edit Order Ship-To Address** panel.

Edit Order Ship-To Address Options

Purpose: By default, the sold-to customer's name and address are displayed. You can perform the following actions on the **Edit Order Ship-To Address** panel.

- *Update Ship-To Name (Prefix, First, Middle, Last, Suffix)*
- *Update Company Name*
- *Update Ship-To Address*
- *Update Delivery Type*
- *Update Email Address*
- *Update Phone Number*

For more information:

- *Edit Order Ship-To Address* for an overview of the **Edit Order Ship-To Address** panel.
- *Fields on Edit Order Ship-To Address* for a description of the fields on the **Edit Order Ship-To Address** panel.

Update Ship-To Name (Prefix, First, Middle, Last, Suffix)

1. Select *Edit* on the Primary Address panel. The customer's name and address details are shown.
2. The
3. Update the *Prefix*, *First Name*, *Middle Initial*, *Last Name*, or *Suffix*.
4. Select **Update**. The system validates your entries. An error message displays if the **Last Name** is blank and a **Company Name** is not defined.
5. If the update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved. The system saves the change to the Order Ship To Address table.

Update Company Name

1. Update the *Company Name*.
2. Select **Update**. The system validates your entries. An error message displays if the **Company Name** is blank and a **Last Name** is not defined.
3. If the update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved. The system saves the change to the Order Ship To Address table.

Update Ship-To Address

By default, the sold-to customer's name and address are displayed,

1. Update the following fields:
   - *Street Address* (**Lines 1-4**): Address line 1 is required.

     To ship to a Post Office Box, enter `POST OFFICE BOX`, `POST BOX`, or any variation of `PO BOX` (with or without spaces or non-alphabet characters, such as `P.O. BOX`), and the box number in the **Street Address Line 1**. **Example:**

Enter `P.O. Box 9999` in **Street Address Line 1** to indicate delivery to a post office box instead of a home or company address. **Note:** You still need to select the **PO box** field in **Work with Customers (WCST)**.

- *Apartment/Suite*: To enter an apartment or suite address, type `APT` to indicate an apartment or `STE` to indicate a suite. Insert a space and type the number of the apartment or suite, for example: `APT 4` or `STE 116`. Addresses must conform to United States Parcel Service (USPS) address formatting field description standards. For example, always precede the apartment or suite number with the appropriate abbreviation (for example, APT or STE).
- *Country* **Code:** Required. Select a valid country code from the drop-down list. For orders that are in error at the header in a batch, displays invalid values passed in orders and allows you to select a valid value and update the order.
- *Postal Code*:
  - The **Postal Code** is required if the **Require postal code?** flag is selected for the country in the **Work with Countries (WCTY)** menu option. If a postal code is required for the country, the system validates the postal code against the SCF table. You can create and work with SCF codes in the **Work with SCF Codes (WSCF)** menu option.
  - If the *Use Zip/City/State Defaulting? (B13)* system control value is selected, you can enter just the postal code to have the system default the associated city and state if these fields are blank.
- *City*: The **City** is required if the *Use Zip/City/State Defaulting? (B13)* system control value is unselected.
- *State/Province* **Code:**
  - The system displays the valid state/province codes defined for the selected country code. For orders that are in error at the header in a batch, displays invalid values passed in orders and allows you to select a valid value and update the order.
  - The **State/Province Code** is required if the **Require state?** flag is selected for the country.
  - The system validates the state/province code against the State table. The system also validates that the state/province code you enter is assigned to the SCF for the postal code. You can create and work with SCF codes in the **Work with SCF Codes (WSCF)** menu option.

> **Note:**
>
> When you enter a partial state or province, matching results are displayed in alphabetical order based on the full state or province name that contains your entry, rather than those that start with your entry. For example, if you enter MA for Massachusetts, Alabama is displayed first because it contains your entry.

2. Select **Update**. The system validates that:
   - A street address (address line 1) is defined.
   - A country is defined.
   - A postal code is defined if the **Require state?** flag is selected for the country.

- The postal code entered exists in the SCF table.
- A city is defined if the *Use Zip/City/State Defaulting? (B13)* system control value is unselected.
- A state/province is defined if the **Require state?** flag is selected for the country.
- The state/province entered exists in the State table and is assigned to the SCF for the postal code.
- The items on the order are not restricted from being shipped to the state or country of the ship-to address you entered. In this situation, you must change the address to a location that is eligible to ship all of the items on the order.
- The email address is formatted correctly.

3. If the address update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved. The system saves the change to the Order Ship To Address table. In addition, the system:
   - Recalculates the tax and freight on the order.
   - If changing the shipping address on the order affects whether the order is subject to VAT and tax-inclusive pricing, the system reprices any open lines based on this change. For example, if you have set up an offer price for an item of $1.00, and a tax-inclusive offer price of $1.50, this item will be repriced from $1.00 to $1.50 if you change the shipping address from a VAT-exempt state to a non-VAT-exempt state. **Note:** Repricing does not take place automatically for any line with a price override reason code.
   - If you change the shipping address for an order which includes an open drop ship PO line processed through the Order Orchestration Drop Ship Manager interface, the system sends the updated address information to Order Orchestration.

> **Note:**
>
> When you update the order ship-to address, the system clears any value that is defined in the order's *Tax Code* and *Tax Identification* fields.

Update Delivery Type

1. Select a valid *Delivery Address Type*) from the **Delivery** field.
2. Select **Update**.
3. If the update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved. The system saves the change to the Order Ship To Address table.

Update Email Address

1. Enter a valid email address in the *Email Address* field.
2. Select **Update**. The system verifies that:
   - There is an @ sign and a period (.),

- There is some text before the @ sign, between the @ sign and the period, and after the period.

3. If the email update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved. The system saves the change to the Order Ship To Address table.
    - If you overwrite the existing email address in this field, the system flags your entry as the primary email address for the customer, but retains the previous email address in the Customer Sold To Email table. You must use the Work with Customer Email Address screen in **Work with Customers (WCST)** to delete the previous email address from this table.
    - If you delete the email address, the system removes the primary email flag for the address but retains the address in the Customer Sold To Email table. You must use the Work with Customer Email Address screen in **Work with Customers (WCST)** to delete the previous email address from this table.

Update Phone Number

If more than one phone number is defined for a ship-to customer (as shown on the *Ship-To* panel), the *Edit Order Ship-To Address* panel only displays one phone number when the order is updated to a one-time ship-to order. The system uses the following hierarchy to determine which phone number to display for the one-time order ship-to address screen.

- home phone number
- business phone number that also supports a phone extension
- mobile or fax phone number as determined by *Third Phone Number Type (L53)* system control value.

1. Update the *Phone Number*. A
2. Select **Update**. The system validates your entry.

    The phone number displays the telephone number format defined for the country (as defined in Work with Country (WCTY)) on the customer's address only after the order is submitted.

    An error message displays if the phone number contains a letter. While the phone number field is alphanumeric, Contact Center allows only numbers and characters in this field, and not letters. For example, you can enter `(508) 555-0100` but not `1800EXAMPLE` in this field.
3. If the update is successful, the system returns you to the previous page and displays a message indicating your changes have been saved. The system saves the change to the Order Ship To Address table.
    - If this field was blank and you enter a new phone number, the system updates the customer's phone number.
    - If you overwrite the existing phone number in this field, the system updates the phone number based on the associated phone type. For example, if the phone number that displays on this panel is the customer's mobile phone number and you overwrite the number, the system updates the customer's mobile phone number.
    - If you delete the phone number, the system removes the phone number based on the associated phone type. For example, if the phone number that displays on this panel is the customer's mobile phone number and you remove the number, the system deletes the customer's mobile phone number.

> **Note:**
>
> The **Phone Number** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Fields on Edit Order Ship-To Address

Purpose: The following information displays on the **Edit Order Ship-To Address** panel.

- *Customer Number* (display-only)
- *Prefix*
- *First Name*
- *Middle Initial*
- *Last Name*
- *Suffix*
- *Company Name*
- *Street Address* (**Lines 1-4**)
- *Apartment/Suite*
- *Country* **Code**
- *Postal Code*
- *City*
- *State/Province* **Code**
- **Delivery** (*Delivery Address Type*)
- *Email Address*
- *Phone Number*: This field displays only if it has been selected for display in the **Work with Contact Center (WWCC)** menu option.

For more information:

- *Edit Order Ship-To Address* for an overview of the **Edit Order Ship-To Address** panel.
- *Edit Order Ship-To Address Options* for step-by-step instructions on the actions you can perform on the **Edit Order Ship-To Address** panel.

25 Edit Ship-To Information

Overview: Use the **Edit Ship-To Information** panel to review and update order ship-to information, such as the order arrival date, ship via, shipping charges, and tax charges.

How to display: Select the **Edit** option in the *Ship-To Information Panel* on the *Order Summary* page.

> **Note:**
>
> You cannot edit order ship-to information if the ship-to*Status* is **Closed**, the order is from Order Orchestration (delivery or pickup), or if the order is a store pickup order.

When you advance to this panel, the system locks the order.

Authority: In order to advance to the **Edit Ship-To Information** panel, you must have authority to the **Enter/Maintain Orders (OEOM)** menu option. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option; you can define menu option authority for a user class in the **Work with User Classes (WUCL)** menu option.

For more information:

- *Edit Ship-To Information Options* for step-by-step instructions on the actions you can perform on the **Edit Ship-To Information** panel.
- *Fields on Edit Ship-To Information* for a description of the fields on the **Edit Ship-To Information** panel.

Edit Ship-To Information Options

Purpose: You can perform the following actions on the **Edit Ship-To Information** panel.

- *Update Ship Via*
- *Update Arrival Date*
- *Update Cancel Date*
- *Update Ship Complete Setting*
- *Update Calculate Shipping Setting*
- *Update Estimated Shipping Amount*
- *Update Shipping Override Amount*
- *Update Tax Code*
- *Update Tax Identification*
- *Update Carrier Number*
- *Update Purchase Order Number*

- *Update Backorder Priority*
- *Update Cancel Backorder Setting*
- *Update Warehouse*
- *Update Gift Setting*
- *Update Discount Percent*

For more information:

- *Edit Ship-To Information* for an overview of the **Edit Ship-To Information** panel.
- *Fields on Edit Ship-To Information* for a description of the fields on the **Edit Ship-To Information** panel.

Update Ship Via

1. Select a ship via from the *Ship Via* drop-down field. Only ship vias eligible for the ship to address SCF display.
2. Optionally, select the *Calculate Shipping (Freight)*field to recalculate the shipping charges for the ship-to order.
3. Select the **Update** option. The system validates your entry. An error message indicates if:
   - The new shipper is not eligible to ship an open item on the order based on the ship via overrides defined for the item. In this situation, the error message displays the item(s) that are not valid with the shipper.
   - You enter an express bill ship via and an item on the order is reserved.
   - You enter an express bill ship via and a drop ship item is printed.

   > **Note:**
   >
   > Entering an express bill ship via is not recommended in Contact Center, because you may not be able to successfully complete the order update.

4. If the update is successful, you return to the *Order Summary* page and a message indicates that the ship-to information was updated.

   All open (unshipped) items ship by the new shipper except items with a ship via override.

   When you unlock the order, the system displays a message if:
   - The ship via selected is not valid for the ship-to postal code.
   - You change the ship via to an express bill shipper and a credit card pay method does not exist with an authorization number and date.
   - You change the ship via to an express bill shipper and an order line is reserved or a drop ship item is printed.

Update Arrival Date

1. Enter a new date in the *Arrival Date* field. The date you enter must be equal to or greater than the order date.

2. Select the **Update** option. The system validates your entry. An error message displays if the arrival date is earlier than the order date.
3. If the update is successful, the system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.

   If the *Auto Update Order Priority (G45)* system control value is selected and the **Backorder Priority** field is 0 (blank), the system also updates the **Backorder Priority** field to **9**.

   The system updates each open (unshipped) item on the order automatically with the new arrival date.

   > **Note:**
   >
   > The **Arrival Date** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Update Cancel Date

1. Enter a new date in the *Cancel Date* field.
2. Select the **Update** option. The system validates your entry.
3. If the update is successful, the system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated. Only open (unshipped) items will be affected by the cancel date.

> **Note:**
>
> The **Cancel Date** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

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 2023 and the current date is April 1, the date is filled in as 4/1/2023, depending on the date format for your locale.

Update Ship Complete Setting

1. Update the setting of the *Ship Complete* field.
   - Select the **Ship Complete** field to indicate the order must ship complete; available items will be held until each item is available and the entire order can ship together.
   - Deselect the **Ship Complete** field to indicate the items on the order can be shipped as they become available, or backordered and shipped at a later date.
2. Select the **Update** option.
3. The system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.

   If the **Ship Complete** field is selected, the system:

   - Reserves available inventory for the order (reserving a partial quantity for an item whenever possible).

- Backorders the remaining inventory for the order; the item's reserved quantity is set to 0.
- Reserves the remaining inventory as it is received on purchase orders; the system ensures that backordered items receive inventory before new orders.
- Creates pre-generated picks for the order **when all items are available**; the warehouse can now pick and ship the order.
- Holds any reserved items until all items can be fulfilled.

If the **Ship Complete** field is not selected, the system:

- Reserves available inventory for the order (reserving a partial quantity for an item whenever possible).
- Creates pre-generated picks for qualifying items; the warehouse can pick and ship these items.
- Backorders the remaining inventory for the order; the item's reserved quantity is set to 0.
- Reserves the remaining inventory as it is received on purchase orders; the system ensures that backordered lines receive inventory before new orders.
- Prints pick slips for the remaining items; the warehouse can now pick and ship these items.

Update Calculate Shipping Setting

1. Update the setting of the *Calculate Shipping (Freight)*field. **Note:** The **Calculate Shipping** field is display-only if a printed pick or an invoice exists for the order or if any order line has a freight charge.
   - Select the **Calculate Shipping** field to recalculate the shipping charges based on the freight method defined for the source code on the order or the shipping override defined for the ship-to order.
   - Deselect the **Calculate Shipping** field to leave the shipping charges on the order as is.
2. Select the **Update** option.
3. The system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.

> **Note:**
>
> The **Calculate Shipping** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Update Estimated Shipping Amount

1. Enter an amount in the *Estimated Shipping (Freight)* field.
2. Select the **Update** option. The system validates your entry. An error message displays if the amount is a negative amount.
3. The system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.

Update Shipping Override Amount

1. Enter an amount in the *Shipping Override* field. **Note:** The **Shipping Override** field is display-only if a printed pick exists for the order or if any order line has a freight charge.
2. Select the **Update** option. The system validates your entry. An error message displays if the amount is a negative amount.
3. The system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.
   - If you change the shipping override amount and a shipping tax override amount exists, the system recalculates the shipping tax override amount on freight for the order ship to using the tax rate for the freight defined in the **OST Freight tax rate** field in the Order Ship To table.
   - If a shipping override exists, the system does not apply any additional shipping, item charges, weight charges, or service charges to the order.
   - The system stores the tax rate for the freight in the **OST Freight tax rate** field in the Order Ship To table; the system uses the freight tax rate during return and cancellation processing to determine the amount of tax on freight that should be returned or deducted during cancellation.

Update Tax Code

1. Select a tax code from the *Tax Code* drop-down field. **Note:** The **Tax Code** field is display-only if a printed pick or an invoice exists for the order.
2. If you select the **Exempt** or **Resale** tax code, enter a number in the **Tax Identification** field. You can also enter a **Tax identification** code with other tax code settings, but in this case the code does not affect taxability.
3. Select the **Update** option. The system validates your entry. An error message displays if:
   - You select the **Exempt** or **Resale** tax code and do not define a tax identification code.
   - You try to change the tax code from standard tax to resale or exempt; this change is not allowed.
4. If the update is successful, the system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.

Update Tax Identification

1. Enter a number in the *Tax Identification* **Number** field. **Note:** The **Tax Identification** field is display-only if a printed pick or an invoice exists for the order.
2. Select the **Update** option. The system validates your entry.
3. If the update is successful, the system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.

Update Carrier Number

1. Enter the customer's carrier account number in the *Carrier Number* field. **Note:** The **Carrier Number** field is display-only if a printed pick or an invoice exists for the order.
2. Select the **Update** option.

3. The system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.

Update Purchase Order Number

1. Enter the customer's purchase order number in the *Purchase Order Number* field.
2. Select the **Update** option.
3. The system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.

> **Note:**
>
> The **Purchase Order Number** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Update Backorder Priority

1. Enter a backorder priority number in the *Backorder Priority* field. Valid numbers are 0 - 9, where 0 is the lowest priority and 9 is the highest priority.
2. Select the **Update** option. The system validates your entry. An error message displays if:

   You enter a negative number.

   You enter a number greater than 9.

   You enter a number with a decimal, such as 1.5.

   You leave this field blank; in this situation, enter 0.
3. If the update is successful, the system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.
   - If the **Backorder Priority** field is 0 and a backorder priority is defined for the source code on the order, the system updates the **Backorder Priority** field to the backorder priority defined for the source code.
   - If the **Backorder Priority** field is 0 and you also update the **Arrival Date** field, the system updates the **Backorder Priority** field to 9 if the *Auto Update Order Priority (G45)* system control value is selected.
   - The Evaluate Backorders program uses the backorder priority to determine which backordered items receive stock first.

> **Note:**
>
> The **Backorder Priority** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Update Cancel Backorder Setting

1. Select or deselect the *Cancel Backorder* field.
   - Select the **Cancel Backorder** field to automatically cancel any backordered items during the next shipment on the order.

- Deselect the **Cancel Backorder** field to retain any backordered items on the order.

2. Select the **Update** option.
3. The system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.

> **Note:**
>
> The **Cancel Backorder** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Update Warehouse

1. Select a warehouse code from the *Warehouse* drop-down field or select blank to remove the warehouse.
2. Select the **Update** option. The system validates your entry.
3. If the update is successful, the system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated.

   If you added or changed the warehouse, the system:

   - Applies the new warehouse code to each open line on the order.
   - Removes the existing inventory reservations for the open order lines on the order that do not contain a printed quantity.
   - Attempts to reserve the items on the order in the new warehouse specified. If an item is not available in the warehouse specified, the system assigns this warehouse as the backorder warehouse for the unreserved quantity of the item on the order line.

   If you removed the warehouse, the system:

   - Removes the warehouse code assigned to each open line on the order.
   - Removes any existing inventory reservations for the open order lines on the order that do not contain a printed quantity.
   - Attempts to reserve the items on the order using regular reservation logic.

> **Note:**
>
> The **Warehouse** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Update Gift Setting

1. Select or deselect the *Gift* field.
   - Select the **Gift** field to indicate the order is a gift.
   - Deselect the **Gift** field to indicate the order is not a gift.
2. Select the **Update** option.
3. The system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated. If the **Gift** field is selected, the system suppresses

prices on the pick slip for open (unshipped) items and prints a Gift Acknowledgment Card for the Sold-to customer when the gift order ships.

Update Discount Percent

1. Enter a number in the *Discount Percent* field.
2. Select the **Update** option. The system validates your entry. An error message displays if the percent you enter exceeds the percent defined in the *Order Discount Percentage Limit (D16)* system control value.
3. If the update is successful, the system returns you to the *Order Summary* page and displays a message indicating the ship-to information was updated. The system applies the merchandise discount to all eligible new items on the order. The discount is not applied to existing items.

> **Note:**
>
> The system allows you to enter a discount percent regardless of your authority to the *Discount Percentage Access (A39)* secured feature.

Fields on Edit Ship-To Information

Purpose: The following information displays on the **Edit Ship-To Information** panel.

- *Additional Charge*s
- *Merchandise Total*
- *Status*
- *Shipping Tax Rate*
- *Broker Delivery Type*: The **Broker Delivery Type** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Ship Via*
- *Arrival Date*: The **Arrival Date** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Cancel Date*: The **Cancel Date** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Ship Complete*
- *Calculate Shipping (Freight)*: The **Recalculate Shipping** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Estimated Shipping (Freight)*
- *Shipping Override*
- *Shipping Tax Override*
- *Tax Code*
- *Tax Identification* **Number**
- *Carrier Number*

- *Purchase Order Number*: The **Purchase Order Number** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Backorder Priority*: The **Backorder Priority** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Cancel Backorder*: The **Cancel Backorder** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Warehouse*: The **Warehouse** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Gift*
- *Discount Percent*

For more information:

- *Edit Ship-To Information* for an overview of the **Edit Ship-To Information** panel.
- *Edit Ship-To Information Options* for step-by-step instructions on the actions you can perform on the **Edit Ship-To Information** panel.

26 Return Ship To

Purpose: Use the **Return Ship-To** panel to return any shipped and unreturned quantity of the lines on a ship-to order.

How to display: Select the **Return Ship-To** option in the **Ship-To Details** panel of the *Order Summary* page.

Requirements to return an order ship-to:

- There has been at least one shipment on an order line and an unreturned quantity.
- The order is not currently locked by another user or session, or by the system.
- You have authority to the **Enter/Maintain Orders (OEOM)** menu option and *Order Maintenance Access (A22)* secured feature,
- You have authority to the *Enter Return Authorization (A28)*, *Receive Return Authorization (A29)*, and *Credit Return Authorization (A34)* secured features.
- You have authority to the *Maintain Order with Printed Quantity (J05)* secured feature if there is a printed quantity on any order line.
- For a brokered backorder, you have authority to the *Maintain Brokered Fulfillment Orders (B20)* secured feature if the order is from Order Orchestration.
- If the *Payment at POS for Ship for Pickup (L60)* system control value is selected, the order is not a ship-for-pickup order, based on the *Broker Delivery Type*.
- If the *Suppress Returns for Retail Pickup/Delivery (L88)* system control value is selected, the order is not a retail pickup or delivery order, based on the *Broker Delivery Type*. This exclusion applies regardless of whether the order originated in Order Administration or in an external system, such as Xstore.
- The order is not a store pickup order.
- You have authority to the return disposition value associated with the selected return reason code.

Any time you select to update the information on an order, the system locks the order so that it cannot be maintained by another user while you are making updates; see *Display of a Locked Order*.

Return updates: When you process the return, updates include:

- An inventory transaction is processed if you use a return disposition value set to update inventory.
- When inventory is updated, an item location record is created if it did not already exist.
- An *Order Line Activity* record is created for each returned item.
- The *Returned Quantity* for each returned order line is updated.
- A refund is created based on the value of the returned quantity and any freight, tax, or charges. See *Returns/Refunds*.

Any unshipped order lines are not updated.

For more information:

- *Return Ship-To Options* for step-by-step instructions on the actions you can perform on the **Return Ship-To** panel.
- *Fields on Return Ship-To* for a description of the fields on the **Return Ship-To** panel.

Return Ship-To Options

Purpose: You can use the **Return Ship-To** panel to return all unreturned items on the order.

For more information:

- *Return Ship To* for an overview of the **Return Ship To** panel, including the conditions when you can process a return and the updates made.
- *Fields on Return Ship-To* for a description of the fields on the **Return Ship-To** panel.

To return an order ship-to:

1. Select **Return** for an order ship-to at the *Ship-To Details Panel Title* of the **Order Summary** page. See *Return Ship To* for information on when the Return option is available.
2. Enter the *Quantity to Return*. You cannot return more than the *Unreturned Quantity* displayed in the upper portion of the panel.

   > **Note:**
   >
   > Unlike order maintenance in Classic View of Order Administration, the **Return Order Line** panel enables you to return multiple units of a ship-alone item in a single return transaction.

3. Select a *Return Reason*.
4. The *Return Disposition* defined in the *Default Disposition Code (C18)* system control value defaults.The return disposition controls whether to return the item to inventory and, if so, it can also define the warehouse and warehouse location where the item is returned. An error message might display if, for example, you do not have authority to the return disposition value. Optionally, you can change the return disposition to another return disposition that you have authority to. See *Return Disposition User Authority* background. Also, see *Return Disposition Scenarios* for a discussion.
5. Depending on the selected *Return Disposition*, the *Warehouse* may default. If the return disposition indicates to update inventory, the *Warehouse* is required.
6. Depending on the selected *Return Disposition*, the *Warehouse Location* may default, or you may need to select it.

> **Note:**
>
> You may need to select **Return** to have the warehouse and location update based on the selected return disposition.

Windows displaying warning messages: You might see one or more windows asking if you would like to create a primary location for the item, or indicating that a primary location does not already exist. The *Allow Multiple Primary Item Locations (D12)* system control valuecontrols whether you can create more than one primary location, or whether to simply display a warning message; the *Display "No Primary Location Message in Returns (G46)* system control value controls whether to display a warning message if there is no primary location defined for the item.

Displayed when? These messages might be displayed if there is not already a record of the returned item in the warehouse location that defaults to this panel, but a primary location for the item already exists; You might also see the message about multiple primary locations when processing the return of an item that has no warehouse location records, such as a *Drop Ship* item.

7. Optionally, select one or more of the following:
   - *Refund Shipping*: If you select **Refund Shipping** and a freight override was applied to the order, the *Current Shipping Amount* indicates the remaining unrefunded shipping charges on the order. For example, you can apply a freight override at the Work with Order Ship To Properties screen in the Classic View of Order Administration. You cannot refund more than this amount for shipping. You can then enter the *Shipping Refund Amount*. This amount cannot exceed the *Current Shipping Amount*.

> **Note:**
>
> If you return an additional item in the current session, the *Current Shipping Amount* displayed reflects the amount you specified to refund when returning the previous item. For example, if the total **Current Shipping Amount** was $50.00 when you returned the first item, and you specified a *Shipping Refund Amount* of $10.00, the **Current Shipping Amount** displayed for the second item is $40.00.

   - *Refund Additional Charges*
   - *Refund Personalization*
   - *Refund Duty Charges*
8. Select **Return** to submit the return.

Add payment method? When you process a return for a retail pickup or delivery order and select the **Unlock Order** option, a message indicates that the only payment method on the order has been deactivated. You cannot unlock the order until you select the **Add Payment** option and add a new payment method. See *Add Payment* for more information.

Fields on Return Ship-To

Purpose: The fields on the *Return Order Line* panel are listed below.

> **Note:**
>
> The **Order** (*Order Number*) is indicated in parentheses after the panel title.

- *Return Reason*. Required.
- *Return Disposition*. Defaults from the *Default Disposition Code (C18)* system control value. See *Return Disposition Scenarios* for background on the field requirements at the **Return Order Line** panel based on the selected return disposition. Required.
- *Warehouse*. The warehouse where the returned item will be received if the return disposition code affects inventory and the use primary location is unflagged or if use primary location is flagged and the item does not have a primary location. This value defaults from the return disposition code but may be overridden by selecting a different warehouse from the drop-down list. If the return disposition code is flagged to use a primary location and the item has a primary location, the item will be returned to the item's primary warehouse and location. This field may be required based on the return disposition.
- *Warehouse Location*. The physical location within the warehouse where the returned item will be received if the return disposition code affects inventory and the use primary location is unflagged or if use primary location is flagged and the item does not have a primary location. This value defaults from the return disposition code but can be overridden by selecting a different location from the chosen warehouse. If the return disposition code is flagged to use a primary location and the item has primary location, the item will be returned to the item's primary location and warehouse. This field may be required based on the return disposition .
- *Refund Shipping*. Optional.
- *Current Shipping Amount*. The remaining unrefunded shipping charges on the order. Displayed only if you select **Refund Shipping** and a freight override was applied to the order. For example, you can apply a freight override at the Work with Order Ship To Properties screen in the Classic View of Order Administration. You cannot refund more than this amount for shipping.
- *Shipping Refund Amount*. Optionally, enter the shipping amount to refund for the return. You can enter a shipping refund amount only if you select **Refund Shipping** and a freight override was applied to the order. This amount cannot exceed the *Current Shipping Amount*.
- *Refund Additional Charges*. Optional.
- *Refund Personalization*. Optional.
- *Refund Duty Charges*. Optional.

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Ship-To Address Book

Purpose: The *Address Book* supports the ability to manage (get, add, edit and delete) multiple shipping names/addresses associated with an individual customer. The Address Book can be accessed from within Modern View Order Entry as well as from the Customer Order List screen.

During order entry, the Ship To (shipping location) automatically defaults to display the customer's name and address. If the customer would like to ship the order somewhere other than their primary address, the Ship To can be edited to create a One Time Address or to assign a Customer Address Book entry.

How to display:

- Select the *Address Book* icon on the *Customer Order List* page to open the *Address Book Drawer* to manage the details of the address book for the sold-to customer.
- Select the **Edit** option in the Ship-To Address Panel on the *Order Entry Shipping* page to access the *Address Book* .

For more information:

- *Ship-To Address Book Options* gives step-by-step instructions on the actions you can perform on the **Address Book** drawer.
- See *Ship-To Address Book Fields* for a description of the fields in the **Address Book** drawer.

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Ship-To Address Book Options

Purpose: The *Address Book* supports the ability to manage (get, add, edit and delete) multiple shipping names/addresses associated with an individual customer. The Address Book can be accessed from within Modern View Order Entry as well as from the Customer Order List screen.

During order entry, the Ship To (shipping location) automatically defaults to display the customer's name and address. If the customer would like to ship the order somewhere other than their primary address, the Ship To can be edited to create a One Time Address or to assign a Customer Address Book entry.

You can perform the following actions on the **Address Book** drawer from the **Add Ship-To** or the **Edit** option in the Ship-To Address Panel on the *Order Entry Shipping* page.

- *Select an Existing Address Book Entry*
- *Add an Address Book Entry*
- *Update the Address Book Entry*
- *Delete an Address Book Entry*

Select an Existing Address Book Entry

1. From the Add/Edit Ship-To drawer, select the **Address Book** radio button.
2. Optionally, click the **Address Book** drop down and you can search for the address to see if the person is already in the address book. You can also start typing to narrow down the search.
3. If found, click the entry you want from the drop down and click **OK** to close the Add/Edit Ship-To drawer. The updated shipping name and address are assigned to the order.

Add an Address Book Entry

Creating an address book for a customer is useful for customers who repeatedly ship to an alternate address. It saves time, over adding the shipping details each time.

> **Note:**
>
> No duplicate match code checking is occurring in this address book so if you enter the same exact name and address, a new entry is created.

1. From the Add/Edit Ship-To drawer, select the **Address Book** radio button.
2. Click **Edit** icon on the Address Book panel. The Address Book drawer opens listing existing entries. The number of entries is shown under the title.
3. Click **+ Add Address**.
4. Enter the required new name and address details and click **OK**. You are returned to the address list. All address information (name, address, and so on,) is in upper case except email that is shown as it is entered.
5. Click **X** to close the address book drawer.
6. Select from the address book drop down again and search for your new address book entry.
7. Click the entry you want from the drop down and click **OK** to close the Add/Edit Ship-To drawer. The new shipping name and address are assigned to the order.

> **Note:**
>
> Creating or editing an address book through Modern View does not write marketing download or customer download trigger records.
>
> When creating an address book entry, if *Use QAS Address Interface (I67)* system control value is enabled, the address is cleansed (for example, shortening the street address to the acceptable USPS format such as ST for Street, CIR for circle, and so on, and adding the +4 to the postal code) if only one match is found.

Update the Address Book Entry

1. From the Add/Edit Ship-To drawer, select the **Address Book** radio button.

2. Click **Edit** icon on the Address Book panel. The Address Book drawer opens listing existing entries.
3. Click **Edit** from the **Actions** menu (⋮.
4. Update the details and click **OK**. You are returned to the address list with the new details shown. Even if no changes are made, a previous address record is written.
5. Click **X** to close the address book drawer.
6. Select from the address book drop down again and search for your new address book entry.
7. Click the entry you want from the drop down and click **OK** to close the Add/Edit Ship-To drawer.

Delete an Address Book Entry

1. From the Add/Edit Ship-To drawer, select the **Address Book** radio button.
2. Click **Edit** icon on the Address Book panel. The Address Book drawer opens listing existing entries.
3. Click **Delete** from the **Actions** menu (⋮.
4. Confirm the deletion and click **OK**. Selecting **OK** checks if the address is being used on the current order or if there is order history for the ship-to, deletes the address book entry, closes the confirmation dialog and refreshes the address book list screen so that the entry is no longer included in the list.
5. Click **X** to close the address book drawer.
6. Click **OK** to close the Add/Edit Ship-To drawer.

For more information:

- *Ship-To Address Book* for an overview of the **Address Book**.
- See *Ship-To Address Book Fields* for a description of the fields in the **Address Book** drawer.

Ship-To Address Book Fields

The following fields are displayed on the *Address Book* drawer:

Address Book Fields

All the address book entries in the drop down list for the address book display in uppercase in a single column. The email address is shown as it is entered. Use the scroll bar or down/ up arrows to go through the list of entries.

Prefix, *First Name*, *Last Name*, *Suffix* (xx) where xx is the ship-to number (address book number) assigned to the customer

Company Name

Street Address 1

Street Address 2-4

Apartment/Suite

City, *State/Province*, *Postal Code*, *Country Code*

Home phone number

Business phone

Mobile or fax

Email Address

+ Add Address Form Fields

Selecting the **Edit** option from the ellipsis of an existing address book entry or selecting **+ Add Address** will open the Address form that contains the following fields:

Prefix: Optional.

First Name: Optional.

Middle Initial: Optional.

Last Name: Required if a company name is not specified.

Suffix: Optional.

Company Name: Required if a last name is not specified.

Street Address 1: Required.

Street Address 2-4: Optional.

Apartment/Suite: Optional.

Country Code: Required. Defaults from the *Default Country for Customer Address (B17)* system control value. Not necessarily the country code of the sold-to customer. Position to the correct country by typing the country name rather than the code.

Postal Code: A valid postal code is required to complete the order if the **Require postal code** flag is selected for the country in Work with Countries (WCTY); otherwise, optional. If the postal code is required for the country, the SCF for the postal code will be validated.

City: Required. No default.

State/Province Code: Required to complete entry of the order if the selected country requires a state or province. No default.

Delivery: Whether Residential, Business or No Distinction.

Email Address: Optional.

Phone Number: All assigned phone numbers (home, business, and mobile/fax) for that Ship-To are shown, displayed with the corresponding phone type in parenthesis following the phone number. The phone numbers in the address book are formatted using the phone number format rules defined at the country level. For each one-time ship-to order, a single assigned phone number is shown on the Shipping stop. Ability to add a phone number if required, see *Add, Change, or Delete the Phone Number at the Enter or Verify Customer Step* in Order Entry.

Rent: Defaults from *Default Rent Name (D11)* system control value but can be overridden.

For more information:

- *Ship-To Address Book* for an overview of the **Address Book**.

- *Ship-To Address Book Options* gives step-by-step instructions on the actions you can perform on the **Address Book** drawer.

28 Multiple Ship-To Address

Purpose: Modern View Order Entry supports assigning multiple ship to records to a single order.

How to display: Open the *Order Entry Shipping* page to access the shipping options for the order.

Order ship-to addresses are addresses that are attached to the orders you are entering. The ship-to address can be the same as the sold-to customer address that is, the default primary address, or from the *Address Book* or an entered address. The system attaches the address automatically to the current order only and you can ship to multiple shipping addresses within that order. The ship-to address can be edited (opens the *Edit Ship-To* drawer to select or create an alternative address or update the current details) or deleted if there is more than one ship-to at the time.

Each ship-to shows additional information and the items assigned. The items can be moved or copied between ship-to's but initially, all items default to ship-to 1. All ship-to items can be edited that is, items added, modified or deleted through *Edit Item Window* or the *Order Entry Summary Panel*.

Both Delivery and Pickup options are available but once Delivery is selected and multiple ship to's added, you cannot go back to Pickup.

When **Next** is clicked, each ship-to is validated to check that each has at least one item assigned to it, otherwise, an error is shown. To resolve the error, add, move or copy items to the empty ship-to, or delete the empty ship-to.

For more information:

- *Multiple Ship-To Address Options* gives step-by-step instructions on the actions you can perform regarding multi ship-to's.
- See *Multiple Ship-To Address Fields* for a description of the fields.

Multiple Ship-To Address Options

You can perform the following actions when working with multiple ship-to addresses:

- *Add Another Ship-To Address*
- *Edit a Multiple Ship-To Address*
- *Delete a Multiple Ship-To Address*
- *Move/Copy Items between Ship-To's*
- *Add a New Item to a Ship-To*
- *Edit Ship-To Items*
- *Delete Ship-To Items*
- *Review and Change Additional Ship-To Details*
- *Errors*

Add Another Ship-To Address

To add another ship-to address to the order:

Select the **Add Ship-To** option in the Ship-To Address Panel on the *Order Entry Shipping* page. The *Add Ship-To* drawer opens that allows you to:

- select and add the primary address details (same as customer address)
- select an existing address book entry - see *Select an Existing Address Book Entry*
- add a new entry to the *Address Book* that can be assigned as a ship-to on the order - see *Add an Address Book Entry*
- edit an existing address book entry and save the changes to the address book - see *Update the Address Book Entry*
- delete an existing address book entry - see *Delete an Address Book Entry*
- enter and save an already keyed one-time ship-to into the address book for future useOne-Time Ship-To Address

Edit a Multiple Ship-To Address

Select **Edit** from the selected **Ship-To X** to edit the shipping address information for the selected items in the order. The **Edit Ship-To** drawer displays three options to change the shipping address for the order:

- Primary Address - same as customer address. The address can be updated if necessary. See *Enter or Verify Customer Information Fields* for a description of the fields,
- *Address Book* - a customer address book allows addresses to be selected, added, edited, or deleted so the order may be shipped to a different address and or person other than the primary address.
- *One-Time Address* - orders can be shipped to a one-off recipient.

Delete a Multiple Ship-To Address

If there is more than one ship-to address at the time, you can delete surplus shipping addresses that are not required.

To delete the shipping address information and all items assigned in the ship-to:.

1. Select **Delete** for the selected specific **Ship-To**.
2. Select **Confirm** to delete.

> **Note:**
>
> All items, messages, and specific shipping details is immediately removed from the order. Any Order Notes stay on the order.

The Ship-To number sequence is updated, starting with 1 and continues sequentially. If only 1 ship to remains after the deletion, the Shipping tab represents a single ship-to. During Review step, only the remaining ship-to details are stored.

Move/Copy Items between Ship-To's

Initially, when another ship-to address is added, all items added to the order thus far are defaulted to ship-to 1 and the new ship-to will have no items for shipping. The number of items assigned for each ship-to (item count) is displayed next to the ship-to name in the ship-to address panel. Items can be moved or copied between ship-to's. As you switch between Ship-To Address components, Ship-To Items is left as the default if that is what you were viewing at the time.

1. Select **Ship-To Items** for the specific ship-to to view all items associated to the selected ship-to.
2. Select the **Ship-To X** containing the item to move. All items associated to the selected ship-to are shown. Each item has a drop down field to move or copy the item.
   - Click in the **Move or Copy Item** drop down for the required item to move. Select the **Ship-To X** under **Move Item To...** required.. The item is immediately removed from the current ship-to, and associated to the ship-to selected in the drop down.
   - Click in the **Move or Copy Item** drop down for the required item to copy. Select the **Ship-To X** under **Copy Item To...** required. The item is immediately copied from the current ship-to and associated to the selected ship-to. Both ship-to's will have that item associated.

     > **Note:**
     >
     > If the item is added by the order API and not explicitly added, it will not display the drop down option. Instead it will display a message of *Item cannot be moved or copied*. For example, accompanying items, free gifts (WPRO)

     – When a Set is copied, the components will be added after the *Review (Order Entry Step 5)* step. Only the set master is shown.

     – Items added through the Order API will not be copied and will be created after the *Review (Order Entry Step 5)* step.

     – Copying personalization from one item to another:

       a. If a personalized item is copied, and there is already personalization added to the item, open the *Edit Personalization Information* where you can edit the information.
       b. If there is not any personalization added to the item, just complete the copy.
       c. If personalization and line messages exist, display personalization before line messages.

     – Copying line messages from one item to another:

       a. If an item is copied and there are line messages for that item, open the *Order Line Message* where you can edit the information.
       b. If there is not any line messages added to the item, just complete the copy.
       c. If personalization and line messages exist, display line messages after the personalization is closed.

- If a coordinate item is copied from one item to another, it will not automatically display the coordinates window. You must manually click the link in the *Order Summary Panel*

Add a New Item to a Ship-To

Click **Add Items** from the Ship-To Items page to go back to the *Items (Order Entry Step 3)* tab where you can *Add Items to the Order*. A message to the right of the items search box indicates which ship-to the items will be added to, based on the specific ship-to that was selected on the *Shipping (Order Entry Step 4)* tab.

As items are added to the cart, they are immediately assigned to the current selected ship-to. When you go back to the *Shipping (Order Entry Step 4)* tab or view or the *Order Entry Summary* panel and look under the **Ship-To Items**, the new items are displayed for the current ship-to. The item count is updated for the specific ship-to.

Edit Ship-To Items

Select **Edit** for an item in the *Order Entry Summary* panel or *Review (Order Entry Step 5)* tab to open the *Edit Item Window*.

Use this window to edit an item on the order. Options include:

- Change the Quantity (*Order Line Quantity Ordered*).
- Change the Price (*Order Line Price*) or set the item to *No Charge*. Either of these changes require entry of an Override Reason (*Price Override Reason*). You cannot change these fields if you do not have authority under the **Price Overrides** secured feature, or if the item is a warranty item.
- Select a different *Ship Via*. All possible ship vias are displayed, but your selection must be a valid ship via for the item and SCF.

Click **OK** to apply your changes.

Delete Ship-To Items

To delete an item for a multi ship-to from Modern View Order Entry:

Select **Delete** for an item in the *Order Entry Summary* panel. The item is removed from the specific ship-to immediately. There is no confirmation message.

The **Delete** option is not available for a set component or other items added to the order automatically, such as through a BOGO promotion or as accompanying items. Also, the **Delete** option is not available in the Order Summary panel at the *Review Order and Verify Order Information* step, although it is available in the *Items Fields*.

If you delete all the items on the order, you cannot advance to the *Add Payment* step. You can *Cancel Entry of the Order* instead.

Review and Change Additional Ship-To Details

Errors

When the Order API automatically adds items to the order, Modern View Order Entry does not recognize those as being entered through the User Interface (UI). If the item that created the free accompanying item is removed, the next time **Refresh** is called, the free accompanying item would no longer appear in the UI either. Since this only occurs after **Refresh**, there is a possibility that a ship-to could end up with no items.

For more information:

- *Multiple Ship-To Address* gives an overview of multi ship-to's.
- See *Multiple Ship-To Address Fields* for a description of the fields.

Multiple Ship-To Address Fields

Purpose: Modern View Order Entry supports assigning multiple ship-to addresses to a single order.

How to display: Open the *Order Entry Shipping* tab to access the shipping options for the order.

If store pickup is enabled, a toggle switch displays Delivery and Pickup. If store pickup is not enabled, the toggle switch is not shown and the default layout is that for Delivery. Each Ship-To information is displayed within its own block known as the **Ship-To Address Panel**. The **Ship-To Details** and **Ship-To Items** toggle switch displays on the right. These toggle options are not shown if it is only a single ship-to on the order.

Ship-To Address Panel

When there is more than one ship-to address, the ship-to highlighted with a blue border and a checkmark indicates the specific ship-to in focus and all actions and details shown apply to that ship-to. The ship-to number is sequential starting with 1 for each ship-to. The badge next to the ship-to name indicates the origin of the address, whether it is the primary address, an entry from the address book, or is an one-time use.

The number of items assigned for each ship-to (item count) is displayed next to the ship-to name in the ship-to address panel. Initially, when another ship-to address is added, all items added to the order thus far are defaulted to ship-to 1 and the new ship-to will have no items for shipping.

Ship-To Details Fields

Additional Charges

The Messages icon is found in the Shipping tab within the Ship-To Details view for a specific ship-to.

Select **Messages** to open the Messages window that contains the:

- *Message Type*: Possible types:
  - Order Note in the Order Notes section.
  - Gift or Pick Slip in the Messages section.

  Within the Messages window, Order Notes apply to the entire order and show regardless of which ship-to you are on when opening the window and Messages apply to the specific Ship-To currently selected. All order notes stay with the order and are not removed when a ship-to is deleted.
- *Message*: The contents of the order note, gift message, or pick slip message.

See *Shipping Details Fields* in *Fields in Order Entry* for a description of the fields.

Additional Order Details Fields

See *Additional Order Details Fields* in *Fields in Order Entry* for a description of the fields.

Ship-To Items Fields

See *Add Items to Order Fields* for a description of the fields.
For more information:

- *Multiple Ship-To Address* gives an overview of multi ship-to's.
- *Multiple Ship-To Address Options* gives step-by-step instructions on the actions you can perform regarding multi ship-to's.

29

Additional Charges

Purpose: Use the **Additional Charges** panel to review and work with the additional charges that have been applied to each ship-to order.

Additional charges are user-defined types of charges that you can add to an order for any reason. You might establish standard additional charge codes for freight fees, personalization charges or rush shipment fees. You might also establish standard credit types of additional charge codes to reimburse the customer for long-distance telephone calls or postage fees.

The additional charges you enter on the **Additional Charges** panel are order-level additional charges, and are not associated with any particular item. The additional charges you enter for an item (for personalization, gift wrapping, etc.) do not appear at this panel.

Additional charge codes are defined in the Additional Charges table; you can create and work with additional charges using the **Work with Additional Charge Codes (WADC)** menu option.

Bills when? An additional charge does not bill until the order goes through billing.

Order totals: Additional charges or discounts are added to or subtracted from the order total, but are broken out from the order totals in the **Additional Charges** field.

How to display: Select the **Additional Charges** option

- In the **Shipping** tab, for every Ship-To in the Ship-To Details section, before the *Messages* button.
- In the **Review** tab, for every Ship-To, before the *Add Items* button.

of *Order Entry* or

from the *Order Summary* page.

In this topic:

- *Types of Additional Charges*
- *Negative Additional Charge Limit*
- *Restricting the Additional Charge Amount*
  - *Enter Amount for Order Additional Charge Code (A80)*
  - *Restricting the Additional Charge Amount if Default Charge (F43)*
  - *Additional Charge Amount Restriction Summary*

For more information:

- *Additional Charges Options* for step-by-step instructions on the actions you can perform on the **Additional Charges** panel.
- *Fields on Additional Charges* for a description of the fields on the **Additional Charges** panel.

Types of Additional Charges

Additional charges are extra charges that you can apply to an order. You can apply the following types of additional charges to an order:

- An additional service charge defined for the source code, based on the dollar value of merchandise on the order. The system adds an additional charge to the order automatically when service charges exist for the source code. The amount of the additional charge is based on the total merchandise dollar value.
- An additional service charge defined for the offer, based on the dollar value of merchandise on the order. The system adds an additional charge to the order when service charges exist for the offer, but not for the source code. The amount of the additional charge is based on the total merchandise dollar value.
- An additional shipping charge defined for the Shipper/Item. An additional charge may be defined for an item, depending on the shipper you select to deliver the item. For example, you might set up a special shipper/item for a desk when it will be delivered by Acme Shippers. Usually, Acme Shippers charges $8.50 to deliver most items, but, because the desk is oversized and heavy, the customer will be charged an extra $25.00 for delivery. The $25.00 additional shipping charge will be added to the order automatically in the **Additional Charges** field when the customer orders the desk and requests delivery through Acme Shippers.
- A guaranteed service charge defined in the offer. A guaranteed service charge will be added automatically to the order when a value exists in the **Guaranteed order charge** field in the offer and the **Exclude service charges** field for the source code is unselected. This is a charge required to guarantee that, if the order does not arrive, a replacement order will be shipped immediately while your company investigates the whereabouts of the original shipment. The system uses the dollar amount defined in the **Default charge** field for the additional charge code to apply to the order. If the order includes more than one ship to customer, the system applies the additional charge code to the first ship to customer.
- An additional charge manually added from the **Additional Charges** panel through the **Add Additional Charge** window. You can add any type of additional charge to the order. The **Add Additional Charge** window allows you to select an additional charge code and specify the additional charge. This allows you to add additional charges to an order at any time. The system displays the additional charge on this window using the value from the applicable **Additional Charge Code** field for the offer. Additional charges and credits are defined in and validated against the Additional Charges table; you can create and work with additional charges using the **Work with Additional Charge Codes (WADC)** menu option. You can define additional charge or credit codes for any reason, such as a charge for store-restocking or import duties or a credit for long-distance telephone charges or postage, etc.

Negative Additional Charge Limit

Purpose: You can limit the total amount of negative additional charges applied to an order by entering a dollar value in the *Negative Additional Charge Limit (E49)* system control value. You cannot override this dollar limit unless you have authority to the *Override Negative Additional Chrge Limit (A60)* secured feature.

An error message displays if you attempt to add a negative additional charge that would bring the total negative additional charges on the order over the limit specified in the *Negative Additional Charge Limit (E49)* system control value, and if you do not have authority to the *Override Negative Additional Chrge Limit (A60)* secured feature, and applies to miscellaneous additional charges only.

> **Note:**
>
> Negative additional charges that are added by the system are not included in the negative additional charge total; also, the total is not decreased by positive additional charges.

Restricting the Additional Charge Amount

Purpose: You can use the *Restrict Additional Charge Amount if Default Charge (F43)* system control value and the *Enter Amount for Order Additional Charge Code (A80)* secured feature to control which users can add additional charges to an order.

Enter Amount for Order Additional Charge Code (A80)

This secured feature controls whether you can enter an amount at the *Add or Edit Additional Charge* windows.

- **Allow** = you can enter or change the additional charge amount for an additional charge code.
- **Exclude** = you cannot enter an additional charge code unless there is a default charge amount specified for the code.

Restrict Additional Charge Amount if Default Charge (F43)

If the *Restrict Additional Charge Amount if Default Charge (F43)* system control value is selected, the **Amount** field is not enterable on the *Add or Edit Additional Charge* windows for any additional charge code that has a **Default Charge Amount** specified unless you have authority to the *Enter Amount for Order Additional Charge Code (A80)* secured feature. If you do not have the authority to change the amount, you will need to change the charge code itself, or delete the code and add a different one.

Additional Charge Amount Restriction Summary

The *Restrict Additional Charge Amount if Default Charge (F43)* system control value and the *Enter Amount for Order Additional Charge Code (A80)* secured feature work in combination.

- If you have authority to the *Enter Amount for Order Additional Charge Code (A80)* secured feature and the *Restrict Additional Charge Amount if Default Charge (F43)* system control value is selected:
  - The **Amount** field at the *Add or Edit Additional Charge* windows is enterable only if there is not a **Default charge amount** for the additional charge code.
  - If the additional charge code has a default amount specified, this amount defaults and you must use the *Add or Edit Additional Charge* window to override it.
- If you have authority to the *Enter Amount for Order Additional Charge Code (A80)* secured feature and the *Restrict Additional Charge Amount if Default Charge (F43)* system control value is unselected:

- The **Amount** field is always enterable at the *Add or Edit Additional Charge* windows.
- If you enter just the additional charge code for a code that has a default amount specified, this amount defaults. However, if you enter the additional charge code but enter an override amount, the override amount is added to the order.

- If you do not have authority to the *Enter Amount for Order Additional Charge Code (A80)* secured feature, regardless of the setting of the *Restrict Additional Charge Amount if Default Charge (F43)* system control value, The **Amount** field is never enterable at the *Add or Edit Additional Charge* windows.

Additional Charges Options

Purpose: You can perform the following actions on the **Additional Charges** panel.

- *Sort the Additional Charges*
- *Add an Additional Charge to the Order Ship-To*
- *Update an Additional Charge*
- *Delete an Additional Charge*

For more information:

- *Additional Charges* for an overview of the **Additional Charges** panel.
- *Fields on Additional Charges* for a description of the fields on the **Additional Charges** panel.

Sort the Additional Charges

You can sort on any column in the **Additional Charges** table by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Additional charges first display on this panel in ascending additional charge code sequence.

Add an Additional Charge to the Order Ship-To

Select the **Add Charge to Order** option to lock the order and advance to the **Add Additional Charge** window (see *Add or Edit Additional Charge*).

- This option is available only if you have ALLOW authority to the *Additional Charges Access (A24)* secured feature and the order is not locked by another user or session or by the system.
- The **Add Charge to Order** option is not available if the *Payment at POS for Ship for Pickup Orders (L60)* system control value is selected and the order is a ship for pickup order.
- The **Add Additional Charges** option is not available if the *Allow Edit and Delete of Error Orders in Modern View (J11)* secured feature is set to EXCLUDE authority when displaying an order with error status. Any data in the Additional Charges window is read-only so you cannot edit or delete existing additional charge data.

> **Note:**
>
> After you add an additional charge to the order, the **Add Charge to Order** option changes to **Add Additional Charge**.

Update an Additional Charge

Select **Edit** from the actions menu (⋮) for an existing additional charge to lock the order and advance to the **Edit Additional Charge** window (see *Add or Edit Additional Charge*).

- This option is available only if you have authority to the *Additional Charges Access (A24)* secured feature, the order is not locked by another user, session, or by the system, and the additional charge has not already been billed.
- The **Edit** option is not available if the *Payment at POS for Ship for Pickup Orders (L60)* system control value is selected and the order is a ship for pickup order.

Delete an Additional Charge

Select **Delete** icon from the actions menu (⋮) for an existing additional charge to remove it from the order. The system locks the order and displays a **Confirm Delete** window. At the **Confirm Delete** window, select **Yes** to delete the additional charge; otherwise, select **No** to cancel the delete.

- This option is available only if you have ALLOW authority to the *Additional Charges Access (A24)* secured feature, the order is not locked by another user, session, or by the system, and the additional charge has not already been billed.
- The **Delete** option is not available if the *Payment at POS for Ship for Pickup Orders (L60)* system control value is selected and the order is a ship for pickup order.

Fields on Additional Charges

Purpose: The following information displays on the **Additional Charges** panel.

Additional Charges Table

The **Additional Charges** table displays the additional charges that have been applied to the order ship-to.

Additional charges first display in ascending additional charge code sequence.

For each additional charge, the table displays the following fields:

- **Charge** (*Additional Charge*)
- **Amount** (*Additional Charge Amount*).
- **Billed** (*Additional Charge Billed*): If the charge has been billed, you cannot change or delete the additional charge. This column is not displayed when the **Additional Charges** panel is accessed from within *Order Entry*.
- **Date** (*Additional Charge Date*): This column is not displayed when the **Additional Charges** panel is accessed from within *Order Entry*

- **User** (*Additional Charge User*): `System Generated` displays if the additional charge was added to the order by the system.

For more information:

- *Additional Charges* for an overview of the **Additional Charges** window.
- *Additional Charges Options* for step-by-step instructions on the actions you can perform on the **Additional Charges** panel.

30 Add or Edit Additional Charge

Overview: Use the:

- **Add Additional Charge** window to an additional charges to the ship-to order.
- **Update Additional Charge** window to update an additional charge assigned to the ship-to order.

Both windows include the same fields.

How to display:

- Select the **Add Charge to Order** option on the *Additional Charges* panel to advance to the **Add Additional Charge** window.

> **Note:**
>
> The **Add Charge to Order** option is available only if you have ALLOW authority to the *Additional Charges Access (A24)* secured feature and the order is not locked by another user.

- Select the **Edit** option from the actions menu (⋮) for an additional charge on the *Additional Charges* panel to advance to the **Edit Additional Charge** window.

> **Note:**
>
> The **Edit** option is available only if you have ALLOW authority to the *Additional Charges Access (A24)* secured feature, the order is not locked by another user, and the additional charge has not already been billed.

For more information:

- *Add or Edit Additional Charge Options* for step-by-step instructions on the actions you can perform on the **Additional Charge** window when in Add or Edit mode.
- *Fields on Add/Edit Additional Charge* for a description of the fields on the **Additional Charge** window when in Add or Edit mode.
- *Additional Charges* for an overview on additional charges.

Add or Edit Additional Charge Options

Purpose: You can perform the following actions on the **Add Additional Charge** or **Edit Additional Charge** window.

- *Add An Additional Charge (Add Additional Charge Window)*

- *Update an Additional Charge (Edit Additional Charge Window)*

For more information:

- *Add or Edit Additional Charge* for an overview of the **Add Additional Charge** and **Edit Additional Charge** windows.
- *Fields on Add/Edit Additional Charge* for a description of the fields on the **Add Additional Charge** and **Edit Additional Charge** windows.

Adding An Additional Charge (Add Additional Charge Window)

When you add an additional charge to the order, the system updates the *Additional Charges* total and recalculates the *Order Total*.

Adding a Negative (Credit) Additional Charge

1. Select **Add Charge to Order** to open the **Add Additional Charge** window.
2. Select the appropriate additional charge from the *Additional Charge* drop down box. Additional charges display in ascending additional charge code sequence.
3. Enter the amount in the **Amount** (*Additional Charge Amount*) field. Press **-** to make the amount a negative value.
   - If you do not have authority to the *Enter Amount for Order Additional Charge Code (A80)* secured feature, the **Amount** field is display-only. In this situation, you must select an additional charge that has a default charge amount defined.
   - If a default charge amount is defined for the selected additional charge code, the amount defaults to the **Amount** field. You cannot change the default additional charge amount if the *Restrict Additional Charge Amount if Default Charge (F43)* system control value is selected.
   - You cannot add a negative additional charge that would bring the total negative additional charges on the order over the limit specified in the *Negative Additional Charge Limit (E49)* system control value if you do not have authority to the *Override Negative Additional Chrge Limit (A60)* secured feature. **Note:** Negative additional charges that are added by the system are not included in the negative additional charge total; also, the total is not decreased by positive additional charges.
   - You cannot add a negative additional charge to an order received from Order Orchestration (delivery or pickup) if the *Suppress Returns for Retail Pickup/ Delivery (L88)* system control value is selected.
4. Select **OK** to apply the additional charge to the order.
5. Repeat steps 1-3 to add another negative additional charge to the order.

> **Note:**
>
> After you add an additional charge to the order, the option changes from **Add Charge to Order** to **Add Additional Charge**.

Entering a Positive (Debit) Charge

1. Select **Add Charge to Order**.

2. Enter the appropriate additional charge in the *Additional Charge* field.
3. Enter the amount in the **Amount** (*Additional Charge Amount*) field.
   - If you do not have authority to the *Enter Amount for Order Additional Charge Code (A80)* secured feature, the **Amount** field is display-only. In this situation, you must select an additional charge that has a default charge amount defined.
   - If a default charge amount is defined for the selected additional charge code, the amount defaults to the **Amount** field. You cannot change the default additional charge amount if the *Restrict Additional Charge Amount if Default Charge (F43)* system control value is selected.
4. Select **OK** to apply the additional charge to the order.
5. Repeat steps 1-2 to add another positive additional charge to the order.

> **Note:**
>
> After you add an additional charge to the order, the option changes from **Add Charge to Order** to **Add Additional Charge**.

Update an Additional Charge (Edit Additional Charge Window)

Updating a Negative (Credit) Additional Charge

1. Select the **Edit** option from the actions menu (⋮) for an additional charge.
2. Update the amount in the **Amount** (*Additional Charge Amount*) field. Press **-** to make the amount a negative value.
   - If the *Restrict Additional Charge Amount if Default Charge (F43)* system control value is selected, you will need to use this window to override any default charge; however, you will be able to do so only if you have the proper authority based on the *Enter Amount for Order Additional Charge Code (A80)* secured feature. If you do not have the authority to change the amount, you will need to change the charge code itself, or delete the code and add a different one.
   - You cannot change a negative additional charge to an amount that would bring the total negative additional charges on the order over the limit specified in the *Negative Additional Charge Limit (E49)* system control value, if you do not have authority to the *Override Negative Additional Charge Limit (A60)* secured feature. **Note:** Negative additional charges that are added by the system are not included in the negative additional charge total; also, the total is not decreased by positive additional charges.
   - You cannot add a negative additional charge to an order received from Order Orchestration (delivery or pickup) if the *Suppress Returns for Retail Pickup/Delivery (L88)* system control value is selected.
3. Select **OK** to update the additional charge and return to the *Additional Charges* window.

Updating a Positive (Debit) Charge

1. Select the **Edit** option from the actions menu (⋮) for an additional charge.
2. Update the amount in the **Amount** (*Additional Charge Amount*) field.

If a default charge amount is defined for the additional charge code, you cannot change the default additional charge amount if the *Restrict Additional Charge Amount if Default Charge (F43)* system control value is selected.

3. Select **OK** to update the additional charge and return to the *Additional Charges* window.

Fields on Add/Edit Additional Charge

Purpose: The following fields display on the **Add Additional Charge** window and **Edit Additional Charge** window (see *Add or Edit Additional Charge*).

- *Additional Charge*:
  - Required at the **Add Additional Charge** window.
  - Display-only at the **Edit Additional Charge** window.
- **Amount**; see *Additional Charge Amount*

For more information:

- *Add or Edit Additional Charge* for an overview of the **Add Additional Charge** window and **Edit Additional Charge** window.
- *Add or Edit Additional Charge Options* for step-by-step instructions on the actions you can perform on the **Add Additional Charge** window and **Edit Additional Charge** window.

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Create Misship

Overview: Use the **Create Misship** panel to enter information on a mistaken shipment for the order ship-to and process the return of the misshipped item. The misship might be an item that was shipped instead of the correct item, or that was inadvertently included when shipping with the correct item(s) on the order.

The information you define at the **Create Misship** panel includes:

- Item to return
- Quantity to return
- Return reason
- Return disposition
- Warehouse and warehouse location where the order should be returned

If multiple items were shipped by mistake, you need to complete this panel for each misshipped item.

How to display: Select **Create Misship** at the *Ship-To Panel* of the **Order Summary** page.

For more information:

- *Create Misship Options* for step-by-step instructions on creating a misship.
- *Fields on Create Misship* for a description of the fields on the **Create Misship** panel.

Creating a Misship

Purpose: Use the **Create Misship** panel to enter information on a mistaken shipment for the order ship-to and process the return. The misship might be an item that was shipped instead of the correct item, or that was inadvertently included when shipping the correct item(s) on the order.

How to display: Select the **Create Misship** option for an order at the *Ship-To Panel* of the *Order Summary* panel.

Note: This option is available only if:

- There has been at least one shipment billed on the order.
- The order is not currently locked by another user or session, or by the system.
- You have authority to the **Enter/Maintain Orders (OEOM)** menu option and *Order Maintenance Access (A22)* secured feature.
- You have authority to the *Enter Return Authorization (A28)*, *Receive Return Authorization (A29)*, and *Credit Return Authorization (A34)* secured features.
- You have authority to the *Maintain Order with Printed Quantity (J05)* secured feature if there is a printed quantity on any order line,
- For a brokered backorder, you have authority to the *Maintain Brokered Fulfillment Orders (B20)* secured feature if the order is from Order Orchestration.

- If the *Payment at POS for Ship for Pickup (L60)* system control value is selected, the order cannot be a ship-for-pickup order, based on the *Broker Delivery Type*.
- If the *Suppress Returns for Retail Pickup/Delivery (L88)* system control value is selected, the order cannot be a retail pickup or delivery order, based on the *Broker Delivery Type*. This exclusion applies regardless of whether the order originated in Order Administration or in an external system, such as Xstore.

Any time you select to update the information on an order, the system locks the order so that it cannot be maintained by another user while you are making updates; see *Display of a Locked Order*.

For more information:

- *Create Misship Options* for step-by-step instructions on how to complete the **Create Misship** panel.
- *Fields on Create Misship* for a description of the fields on the **Create Misship** panel.

Misship updates: When you create a misship:

- An inventory transaction is processed if you use a return disposition value set to update inventory.
- When inventory is updated, an item location record is created if it did not already exist.
- A “no charge” order line with a negative quantity is added to the order for the misship.

Create Misship Options

Purpose: Use the *Create Misship* panel to enter information on a mistaken shipment for the order ship-to and process the return. The misship might be an item that was shipped instead of the correct item, or that was inadvertently shipping with the correct item(s) on the order.

To create the misship:

1. Select **Create Misship** at the *Ship-To Panel* of the **Order Summary** panel. See *Create Misship* for information on when the Create Misship option is available.
2. Enter the *Item ID* that was shipped by mistake. If you are not sure of the Item ID, see *Search for an Item or SKU* for information on searching.

> **Note:**
>
> You cannot create a misship for a set item.

3. Enter a *SKU* if the misshipped item has SKU’s.
4. Enter the *Quantity to Return*.

> **Note:**
>
> The message `Enter a number between 1 and 99,999` is displayed until you complete the panel.

5. Select a *Return Reason* indicating that the item is a misship.

   The *Return Disposition* defined in the *Default Disposition Code (C18)* system control value defaults. The return disposition controls whether to return the item to inventory and, if so, it can also define the warehouse and warehouse location where the item is returned. Optionally, you can change the return disposition to another return disposition that you have authority to. See *Return Disposition User Authority* background. Also, see *Return Disposition Scenarios* for a discussion.

6. Depending on the selected *Return Disposition*, the *Warehouse* may default. If the return disposition indicates to update inventory, the *Warehouse* is required. However, besides the warehouse defined for the return disposition, if any, only warehouses that have a record of the item are available for selection.

7. Depending on the selected *Return Disposition*, the *Warehouse Location* may default, or you may need to select it. However, besides the warehouse location defined for the return disposition, if any, only warehouse locations that have a record of the item are available for selection.

8. Select **Return**. The panel displays the message `The SKU code or Item Number has changed. Please confirm and resubmit the return`. This message indicates that the panel has reloaded with the correct warehouse and location for the misshipped item, which may differ from the information that defaulted to the page when you initially opened it.

9. Select **Return** again if the warehouse and location are correct to create the misship return.

Windows displaying warning messages: You might see one or more windows asking if you would like to create a primary location for the item, or indicating that a primary location does not already exist. The *Allow Multiple Primary Item Locations (D12)* system control value controls whether you can create more than one primary location, or whether to simply display a warning message; the *Display "No Primary Location Message in Returns (G46)* system control value controls whether to display a warning message if there is no primary location defined for the item.

Displayed when? These messages might be displayed if there is not already a record of the returned item in the warehouse location that defaults to this panel, but a primary location for the item already exists; You might also see the message about multiple primary locations when processing the return of an item that has no warehouse location records, such as a *Drop Ship* item.

Fields on Create Misship

Purpose: The following information displays on the *Create Misship* panel.

- *Item ID*. Required.

> **Note:**
>
> You can’t create a misship for a set item.

- *SKU*. Required if the item has SKU’s.
- *Quantity to Return*. Required.
- *Return Reason*. Typically, the return reason you select indicates that this is a misship. Required.
- *Return Disposition*. Defaults from the *Default Disposition Code (C18)* system control value. See *Return Disposition Scenarios* for background on the field requirements at the **Create Misship** panel based on the selected return disposition. Required.
- *Warehouse*. The warehouse where the returned item will be received. This value is used only if the disposition code affects inventory. If there is only a single existing Item Warehouse record for the item, you cannot select a different warehouse. Also, if a warehouse is defined for the return disposition code, this warehouse defaults. May be required based on the return disposition.
- *Warehouse Location*. The physical location within the warehouse where the returned item will be received. This value is used only if the disposition code affects inventory. If there is only a single existing Item Location record for the item, you cannot select a different location; however, if the return disposition defines a default return location and warehouse, such as returns location in a virtual returns warehouse, this warehouse and location default. May be required based on the return disposition.

For more information: See:

- *Create Misship* for background.
- *Create Misship Options* for the steps to create a misship.

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Add Item

Purpose: Use the **Add Item** panel to add an order line to an order.

The system assigns the next available line number to the item you are adding to the order. The system performs the same item validations as in order entry, such as:

- Reserving the item (if using immediate reservation).
- Updating order totals.
- Performing credit checking to ensure the order has valid customer and payment information.

How to display: Select the **Add Item** option in the *Order Lines Panel* of the *Order Summary* page.

In order to add an order line:

- The order cannot be currently locked by another user, the system, or another session.
- The order cannot be a store pickup or ship for pickup order, based on the *Broker Delivery Type*.
- The order cannot be from Order Orchestration (delivery or pickup), based on the *Broker Delivery Type*.

For more information:

- *Add Item Options* for step-by-step instructions on the actions you can perform on the **Add Item** panel.
- *Fields on Add Item* for a description of the fields on the **Add Item** panel.

Add Item Options

Purpose: You can perform the following actions on the **Add Item** panel.

- *Search for an Item or SKU*
- *Add an Item or SKU*

For more information:

- *Add Item* for an overview of the **Add Item** panel.
- *Fields on Add Item* for a description of the fields on the **Add Item** panel.

Search for an Item or SKU

1. Optionally, enter text in the search field to find items based on matches in *Item Description*, *Keywords*, or *Item ID*.
2. Enter one or more search terms to display items that fully or partially match your entry based on item code, description, or keyword; however, if your entry is an exact match to a specific item code:

- Partial matches are not displayed. For example, if you search on PEN and items include both PEN and PENCIL, only the PEN is displayed; but if you search on PEN and items include both PEN23 and PEN34, both items are displayed.
- Items that include your entry as part of their descriptions are not displayed. For example, if you search for SPICE and items include SPICE and an item with "spice" as part of the description, only the SPICE is displayed.

3. Press Enter. The system validates your entries. An error message displays if:
   - The system cannot find any items that meet your search criteria.
   - The system finds more than 500 items that meet your search criteria. In this situation, you must further refine your search entry.
4. If the search returns results, the Add Items panel displays all items that match your search. However, if an item has an item status code that matches the item status code defined in the *Item Status for Suppressing Item During Item Selection (L21)* system control value, the system does not include the item in the search results.
5. Click **Select SKU's** for a SKU'd item to display SKU's for the item.
6. Optionally, enter a full or partial SKU in the search field to find SKU's that contain your entry.

> **Note:**
>
> The SKU is made up of three four position fields. If you search on more than one SKU element, you must enter the full four positions for each field. For example:
>
> - If you search for RED SML, you must type `RED  SML`, where the space between `RED` and `SML` is two blank spaces. You need to enter one space to represent the forth position of the RED SKU element and the other space represents the space between the SKU elements.
> - If you search for BLUE SML, you must type `BLUE SML`, where the space between `BLUE` and `SML` is one blank space to represent the space between the SKU elements.

Add an Item or SKU

> **Note:**
>
> Do not add the following types of items to the order:
>
> - A virtual gift (stored value) card item to the order if there is not an email address for the customer.
> - An item that requires standard personalization, in which you enter free-form text only.

1. Enter the quantity of the item you wish to add to the order in the **Quantity** (*Order Line Quantity Ordered*) field. The number defined in the *Default Order Quantity*

(B30) system control value defaults, but you can override it. You cannot enter a negative quantity.

> **Note:**
>
> - If the specified quantity is larger than the *Maximum Order Quantity (C60)* system control value and you do not have authority to the *Allow Maximum Order Quantity Override* secured feature, a quantity of 1 is added to the order.
> - If this is a *Ship-for-Pickup Order*, the selected item is flagged as ship-alone, and the quantity is more than 1, an error message indicates that you cannot add the item to the order.

2. Optionally, enter the price (*Order Line Price*) you wish to charge for the item, or select the *No Charge* field. If you do not enter a price or set the line to no charge, the system uses normal pricing logic to determine the price. These options are available only if you have authority to the *Price Overrides (A23)* secured feature. If you enter either of these fields, you will need to complete the *Additional Information Required Window*.
3. Optionally, to add a specific Ship Via to an order line, select the **Ship Via Override** toggle. If you selected the toggle on, you will need to complete the *Additional Information Required Window* to select the alternative Ship Via from the drop down field. The ship via could be an express bill ship via, if the customer already has the item, or any ship via valid for the item and SCF of the ship to address.
4. Select **Add to Order**. Depending on the item and your entries, you may need to complete the Additional Information Required Window.

Additional Information Required Window

This window opens if:

- You have entered an override price or selected the *No Charge* field. In this case, a *Price Override Reason* displays and is required.

> **Note:**
>
> If the added item is a warranty item, it is added to the order at no charge and a price override reason defaults. You cannot override the price for a warranty item.

- The *Require Reason for Lines Added in Order Maintenance (D75)* system control value is selected or the **Required reason code** flag for the item offer or SKU offer is selected. In this case, the *Add Line Reason* displays and is required. The first add line reason in alphanumeric order defaults, but you can override it.
- The item you have entered is a membership item. In this case, the *Membership Program* displays and is required. Typically, you should select the membership program whose name matches the item code. Do not select a loyalty membership program.
- When adding the item you selected the *Ship Via Override* toggle, in order to change the shipper for the item.

In any of these cases, you will need to complete this window to add the item to the order. Otherwise, this window does not open.

Select the **Add Order Line** option. The system validates your entries.

Add Item Validation

Add item troubleshooting: An error message indicates if:

- An item code is not defined in the **Item ID** field or the item code entered in invalid.
- The item contains SKU's, and a SKU code is not defined in the **SKU** field.
- A number is not defined in the **Quantity** field or the number is greater than 99,999.
- The number in the **Quantity** field is greater than the number in the *Maximum Order Quantity (C60)* system control value and you do not have authority to the *Allow Maximum Order Quantity Override (A70)* secured feature.
- You leave the **Price** field blank and the system cannot determine the price for the item. In this situation, you must enter a price in the **Price** field and enter a reason in the **Price Override Reason** field.
- The price you enter in the **Price** field is greater than the price in the *Maximum Order Line Value (E98)* system control value and you do not have authority to the *Allow Maximum Order Line Value Override (A69)* secured feature.
- You enter a price in the **Price** field for a warranty item. In this situation, you must remove the price since warranty items are sold at no charge.

If your entries pass validation, the system:

- Displays the *Item SKU Information* window if the item added is associated with item/SKU status messages and/or item/SKU comments whose **Print Code** is set to **W Window**.
- If the item added is a warranty item, applies the price override reason defined in the *Default Price Override Reason for Warranty Items (G01)* system control value to the order line.
- Reserves the item if you use immediate reservation.
- Updates the order totals.
- If the item added is a variable set, you advance to the *Select Variable Set Items* page.
- If there are any item/SKU comments, you advance to the *Item SKU Information* window.
- Otherwise, you return to the previous page with the newly added item in the *Order Lines Panel*.
- If you order a virtual gift card item (the **SVC type** field for the item is **V Virtual**), the system requires you to define an email address in order to send a gift card notification (Stored Value Card Notification Email) to the recipient of the gift card. If an email address is not defined, the system displays an error message when you select to unlock the order; in this case, you need to cancel the virtual stored value card from the order.
- If the item has associated coordinate items, a message indicates this fact. You can use the **Add Coordinate Items** option for the order line to advance to the *Select Coordinate Items* page, where you can review coordinates or add them to the order.

- If the item offer or SKU offer requires personalization based on the assignment of a **S/H Code** to the item offer or SKU offer, and there is not an item class restriction against personalization, you advance to the *Add Personalization* window.

When you unlock the order, if the order's status was previously Closed or Canceled, it resets to Open status.

Fields on Add Item

Purpose: The following information displays on the **Add Item** panel.

Search for Items

Use a single field to search for an item by *Item Description*, *Item ID*, or *Keywords*.

Item Search Results Fields

- *Item Image*: Displayed if the *Use External Item Image (L55)* system control value is selected and an item or SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no item or SKU image has been defined. Display-only.
- *Item Information Link*: Displayed if an item information link has been defined and the *Use External Item Image (L55*) system control value is selected.
- *Item Description*
- *Item ID*. Follows the item description in parentheses.
- **Quantity** (*Order Line Quantity Ordered*): The number defined in the *Default Order Quantity (B30)* system control value defaults.

> **Note:**
>
> If the specified quantity is larger than the *Maximum Order Quantity (C60)* system control value and you do not have authority to the *Allow Maximum Order Quantity Override* secured feature, a quantity of 1 is added to the order.

- **Price** (*Order Line Price*). Leave this field blank to use the system-calculated price.

> **Note:**
>
> – You cannot add the item at price that is greater than the value set in *Maximum Order Line Value (E98)* if you do not have authority to the *Allow Maximum Order Line Value Override (A69)* secured feature.
>
> – If an exchange item is a warranty item, it is added to the order at no charge and a price override reason defaults. You cannot override the price for a warranty item.
>
> – To add an item at no charge, select the *No Charge* flag.

- *No Charge*

- **Ship Via Override**: Toggle switch that allows a specific Ship Via for an order line. You will need to complete the **Additional Information Required** after selecting **Add to Order**.

The Add to Order option is displayed unless the item has SKU's.

Select SKU's Fields

Above the SKU's:

- *Item Image*. Displays only if the *Use External Item Image (L55)* system control value is selected.
- *Item Description*
- *Item ID*. Follows the item description in parentheses.

SKU's:

- SKU image (see *Item Image*): Displayed if the *Use External Item Image (L55)* system control value is selected and a SKU image has been defined. A placeholder image is displayed if *Use External Item Image (L55)* is selected but no SKU image has been defined. Display-only.
- SKU information link (see *Item Information Link*:) Displayed if a SKU information link has been defined and the *Use External Item Image (L55)*) system control value is selected. Indicated by an exclamation point in the SKU image or image placeholder.
- *SKU* description, followed by the SKU code in parentheses.
- **Quantity** (*Order Line Quantity Ordered*): The number defined in the *Default Order Quantity (B30)* system control value defaults.

  > **Note:**
  >
  > If the specified quantity is larger than the *Maximum Order Quantity (C60)* system control value and you do not have authority to the *Allow Maximum Order Quantity Override* secured feature, a quantity of 1 is added to the order.

- **Price** (*Order Line Price*). Leave this field blank to use the system-calculated price.

  > **Note:**

  – You cannot add the item at a price that is greater than the value set in *Maximum Order Line Value (E98)* if you do not have authority to the *Allow Maximum Order Line Value Override (A69)* secured feature.

  – If the exchange item is a warranty item, it is added to the order at no charge and a price override reason defaults. You cannot override the price for a warranty item.

  – To add an item at no charge, select the *No Charge* flag.

- *No Charge*

- **Ship Via Override**: Toggle switch that allows a specific Ship Via for an order line. You will need to complete the **Additional Information Required** after selecting **Add to Order**.

> **Note:**
>
> Do not add the following types of items:

- A virtual stored value card item to the order if there is not an email address for the customer.
- An item that requires standard personalization, in which you enter free-form text only.

Additional Information Required Window

Displays the item description and ID for the selected item, as well as the item or SKU image if the *Use External Item Image (L55)* system control value is selected.

- *Price Override Reason*: Displays only if you enter an override price or select No Charge.
- *Add Line Reason*: Displays only if the *Require Reason for Lines Added in Order Maintenance (D75)* system control value is selected or the **Required reason code** flag for the item offer or SKU offer is selected.
- *Membership Program*: Displayed only if you add a membership item. The first active standard membership program in alphanumeric order defaults, but you can override it. Typically, you should select the membership program whose name matches the item code. Do not select a loyalty membership program.
- *Ship Via*: Displayed if the Ship Via Override toggle was enabled when adding an item. Allows you to define a specific ship via for the line that is different from the ship via that was assigned to the order. The list of ship via values in the drop down is based on the following:
  - Overrides: If there are one or more Ship via overrides set-up for the item (in MITM), the Ship Via drop down lists only those Ship Via values. If there are no overrides set, the Ship Via drop down displays all the ship via values from the Ship Via table.
  - SCF: Only ship vias eligible for the ship to address SCF display.
  - Quotes: If the order is a quote, the Ship Via field does not include ship vias with a billing code of Express Bill (E).

  Order lines that you Express Bill do not affect inventory, hence there will be no change (reduction) made for the item in the inventory.

For more information:

- *Add Item* for an overview of the **Add Order Line** panel.
- *Add Item Options* for step-by-step instructions on the actions you can perform on the **Add Item** panel.

33 Item SKU Information

Purpose: Use the **Item SKU Information** window to review any comments and status messages defined for the item or SKU.

How to display: This window automatically opens when you add an item to an order if:

- There are any item/SKU comments associated with the item or SKU whose **Print Code** is set to **W Window**.
- An item/SKU status message is defined for the status code associated with the item or SKU.

For more information:

- *Item SKU Information Options* for step-by-step instructions on the actions you can perform on the **Item SKU Information** window.
- *Fields on Item SKU Information* for a description of the fields on the **Item SKU Information** window.

Item SKU Information Options

Purpose: No additional actions are available on the **Item SKU Information** window.

For more information:

- *Item SKU Information* for an overview of the **Item SKU Information** window.
- *Fields on Item SKU Information* for a description of the fields on the **Item SKU Information** window.

Fields on Item SKU Information

Purpose: The following information displays on the **Item SKU Information** window.

- *Item Description*: Unlabeled field below the **Item/SKU Information** window title.
- *Item ID*: Unlabeled field that displays to the right of the **Item Description**.
- *SKU Description*

Comments

This section displays only if there are any item/SKU comments associated with the item or SKU whose **Print Code** is set to **W Window**.

- *Item/SKU Comment*: Unlabeled field below the **Comments** title. A separate row displays for each comment. Comments defined at the SKU level display; if there are no comments defined at the SKU level, comments defined at the item level display.

Status Messages

This section displays only if an item/SKU status message is defined for the status code associated with the item or SKU.

- *Item/SKU Status Message*: Unlabeled field below the **Status Messages** title. A separate row displays for each status message. Status messages defined at the SKU level display; if there are no status messages defined at the SKU level, status messages defined at the item level display.

For more information:

- *Item SKU Information* for an overview of the **Item SKU Information** window.
- *Item SKU Information Options* for step-by-step instructions on the actions you can perform on the **Item SKU Information** window.

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Edit Order Line

Purpose: Use the **Edit Order Line** panel to update an order line on an order.

How to display: Select the **Edit** option from the actions menu (⋮) for an order line on the *Order Lines Panel* of the *Order Summary* panel.

To edit an order line:

- The order cannot be currently locked by another user, the system, or another session,
- The order line status must be open or held and cannot have a printed quantity,
- The order line cannot be brokered,
- If the order line contains a set component item, you must have authority to the *Set Component Maintenance (J01)* secured feature,
- The order cannot be received from Order Orchestration (delivery or pickup), based on the *Broker Delivery Type*,
- The order cannot be a store pickup order, based on the *Broker Delivery Type*.

In this topic:

- *Price Override Limit Percent*

For more information:

- *Edit Order Line Options* for step-by-step instructions on the actions you can perform on the **Edit Order Line** panel.
- *Fields on Edit Order Line* for a description of the fields on the **Edit Order Line** panel.

Price Override Limit Percent

Purpose: The *Price Override Limit Percent (E55)* system control value defines the percentage of the price override limit you can enter for items. The system uses the price defined in the item/offer to determine whether the price override exceeds the percentage. The override limit applies only to prices that are lower than the item/offer price. This is helpful in reducing the possibility of fraud by order entry operators.

Override Price Override Limit Authority

The *Override Price Override Limit (A64)* secured feature controls the ability to override the percentage defined in the *Price Override Limit Percent (E55)* system control value.

If you do not have authority to this secured feature, and:

- The price override exceeds the *Price Override Limit Percent (E55)*, the system displays an error message if the entered price is less than the percentage allowed.
- The price override does not exceed the *Price Override Limit Percent (E55)*, the system processes the order line if you enter a price that does not exceed the percentage.

If you have authority to this secured feature, and:

- The price override exceeds the *Price Override Limit Percent (E55)*, the system processes the order line and writes a **W** order transaction history record for the price override. The **W** transaction history record shows you the line on the order where a price override occurred, the price override amount and the user ID of the person who performed the price override.
- The price override does not exceed the *Price Override Limit Percent (E55)*, the system processes the order line.

Price Override Example

The system uses the following calculation to determine the percentage of the price override:

```
(offer price - price override entered) / offer price * 100 =
price override percentage
```

```
price override percentage = 10%
```

```
offer price = $40.00
```

```
price override = $35.00
```

```
(40.00 - 35.00) = 5.00
```

```
5.00/40.00 = .125
```

```
.125 * 100 = 12.50 (12.50 exceeds the 10% price override)
```

Edit Order Line Options

Purpose: You can perform the following actions on the **Edit Order Line** panel. The edit option is available regardless of how the line was added to the order.

- *Update Quantity Ordered*
- *Update Price*
- *Update Offer*
- *Apply a Coupon to the Item*
- *Update the Gift Wrap Setting*
- *Update the Affect Inventory Setting*
- *Update User Hold Setting*
- *Update Arrival Date*
- *Update Cancel Date*
- *Update Priority Setting*
- *Update Coordinate Group Setting*
- *Update Ship Via*
- *Update the Recalculate Shipping Setting*
- *Update Shipping Charge*
- *Update Warehouse*

> **Note:**
>
> The system creates an order transaction history message only if you change the order line quantity.

For more information:

- *Edit Order Line* for an overview of the **Edit Order Line** panel.
- *Fields on Edit Order Line* for a description of the fields on the **Edit Order Line** panel.

Update Quantity Ordered

1. Update the quantity in the **Quantity Ordered** (*Order Line Quantity Ordered*) field.

   If you enter a number that is lower than the current order line quantity, you need to also select a *Cancel Reason*. This action can trigger the generation of the *Cancellation Email*; see *Cancel Order Line* for background.

   If the item on the order line has partially shipped, the **Quantity Ordered** field is display-only.
2. Optionally, use the *Recalculate Shipping* setting to indicate if you wish to recalculate shipping for the item based on changes to its quantity or price.
3. Select the **Update Order Line** option. The system validates your entry. An error message displays if:
   - You enter a quantity that is less than the current order line quantity.
   - You enter a negative quantity.
   - You enter a quantity that is greater than the quantity in the *Maximum Order Quantity (C60)* system control value and you do not have authority to the *Allow Maximum Order Quantity Override (A70)* secured feature.
   - You leave the **Quantity Ordered** field blank.
4. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made. The system creates an order transaction history message when you change the order line quantity.

If the new quantity now qualifies for an accompanying item defined for the Item Offer or SKU Offer, the accompanying item is added to the order.

> **Note:**
>
> If you lower the order line quantity using more than one cancel reason code, the order line *Cancellation Email*, if generated, lists the entire quantity canceled during the current session. For example, the customer indicates that there was a keying error that resulted in reducing the order line quantity from 50 to 15; also, the customer wants to now reduce the order line quantity to 10. The email indicates a cancel quantity of 40, even though quantities of 35 and 5 were canceled using different cancel reason codes.

Update Price

These options are available only if you have authority to the *Price Overrides (A23)* secured feature and if the item on the order line has not been fully or partially shipped.

1. Update the price defined in the **Price** (*Order Line Price*) field, or select the *No Charge* field.
2. Enter a price override reason in the *Price Override Reason* field.
3. Optionally, use the *Recalculate Shipping* setting to indicate if you wish to recalculate shipping for the item based on changes to its quantity or price.
4. Select the **Update Order Line** option. The system validates your entry. An error message displays if:
   - You enter a negative price for the order line, regardless of the setting of the *Allow Negative Prices in Order Entry (E97)* system control value.
   - You enter a price that is greater than the limit defined in the *Price Override Limit Percent (E55)* system control value if you do not have authority to the *Override Price Override Limit (A64)* secured feature.
   - You enter a price that is greater than the price in the *Maximum Order Line Value (E98)* system control value and you do not have authority to the *Allow Maximum Order Line Value Override (A69)* secured feature.
   - You do not define a price override reason.
   - You select the price override reason that is defined in the *Price Override Reason for Promotions (K45)* system control value.
   - You select the price override reason that is defined in the *Price Table Level Override Code (E05)* system control value.
   - You select the price override reason that is defined in the *Price Override Reason for Price Matrix Customer Specials (K42)* system control value.
5. If the update passes validation, the system returns you to the previous page and displays a message indicating the update was made.
   - The system displays the new price for the order line.
   - To the left of the unit price, is the offer price with a strikethrough. The offer price with strikethrough only appears if the offer price is greater than the unit price and *Display Order Line Discount Message (F01)* system control value is selected. If F01 is not selected or the offer price is less than unit price, then only the unit price is shown. When F01 is selected and an offer price with strikethrough is shown, this is meant to represent the customer received a discount on this item.
   - If the price is set to 0, the system flags the order line as **No Charge**.

Update Offer

1. Select an offer from the *Offer* drop-down field.

   The **Offer** field displays only offers whose start date is less than or equal to the current date and whose end date is greater than or equal to the current date.

   You cannot change the offer if any shipments have been made on the line.
2. Select the **Update Order Line** option. The system validates your entry. An error message displays if:

- The offer you enter does not use the same freight and pricing methods as the previous offer defined for the order line.
- Special handling is defined for the item on the order line and the offer does not allow special handling.
- The source code assigned to the item is not valid for the new offer.

3. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made.

When you update the offer, the system may reprice the item, determine whether the item is eligible for personalization or gift wrapping, validate the type of personalization, and update the personalization and gift wrapping charges, if any.

> **Note:**
>
> The **Offer** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Apply a Coupon to the Item

1. Select the **Coupon** (*Order Line Coupon*) field.
2. Enter a coupon amount in the **Coupon Amount** (*Order Line Coupon Amount*) field. If the item on the order line has partially shipped, the **Coupon Amount** field is display-only.
3. Select the **Update Order Line** option. The system validates your entry. An error message displays if the coupon amount you enter is greater than or equal to the current price.
4. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made. The dollar amount of the coupon will be subtracted from the price of the item and `*Coupon Item Price` will be assigned to the order line as the pricing method.

For a coupon to be applied to an item, the *Pricing Values (B31)* in the System Control table must use the **COUPON/ITEM** pricing method (or it should be near the top of the pricing hierarchy) or you should use *Best Way Pricing (A78)* so that the system can give the item to the customer at the lowest available price.

> **Note:**
>
> The **Coupon** and **Coupon Amount** fields display only if they are selected for display in the **Work with Contact Center (WWCC)** menu option.

Update the Gift Wrap Setting

1. Update the *Gift Wrap* setting.
   - Select the **Gift Wrap** setting to indicate the item on the order line should be gift wrapped.
   - Deselect the **Gift Wrap** setting to indicate the item on the order line should not be gift wrapped.
   - If the item on the order line has partially shipped, the **Gift Wrap** field is display-only.

2. Select the **Update Order Line** option. The item/offer or SKU/offer record determines whether the item is eligible for gift wrapping.
3. If the update is successful, the system returns you to the previous page.

> **Note:**
>
> The **Gift Wrap** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Update the Affect Inventory Setting

1. Update the *Affect Inventory* setting.
   - Select the **Affect Inventory** setting to indicate the item reduces inventory.
   - Deselect the **Affect inventory** setting to indicate the item does not reduce inventory.
   - The **Non inventory** field in the Item table determines which value defaults in this field.
   - You cannot change the **Affect Inventory** flag for a drop ship item.
   - If the item on the order line has partially shipped, the **Affect Inventory** field is display-only.
2. Select the **Update Order Line** option. The system validates your entry.
3. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made.

If this field is unselected, the system will not perform pick slip preparation for the item if all other items on the order are backordered; when one or more backordered items are available, the system will perform pick slip preparation for the non-inventory item as well as for the available item(s).

Update User Hold Setting

1. Update the *User Hold* setting.
   - Select the **User Hold** setting to place the order line on hold. Only open, unprinted order lines are eligible to be held.
   - Deselect the **User Hold** setting to release the order line from hold.

   The **User Hold** field is display-only if you do not have authority to the **O/E Hold, Release Order Lines (A46)** secured feature or the item on the order line has partially shipped.
2. Select the **Update Order Line** option.
3. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made.

When you place an order line on hold, the order line status changes to held (H) and the item will not be eligible for pick slip preparation until you release the line.

Update Arrival Date

1. Update the date in the *Arrival Date* field. This is the date when the customer wants to receive the order.

If the item on the order line has partially shipped, the **Arrival Date** field is display-only.

2. Select the **Update Order Line** option. The system validates your entry. An error message displays if:
   - The date is invalid.
   - The arrival date is earlier than the order date.
3. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made.

> **Note:**
>
> The **Arrival Date** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

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.

Update Cancel Date

1. Update the date defined in the *Cancel Date* field.
2. Select the **Update Order Line** option. The system validates your entry. An error message displays if the date is invalid.
3. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made.

> **Note:**
>
> - Updating the cancel date is the only action you can perform against an order line that has partially shipped.
> - The **Cancel Date** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
> - 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.

Update Priority Setting

1. Enter a number in the **Priority** (*Backorder Priority*) field between 0 and 9.

   If the item on the order line has partially shipped, the **Priority** field is display-only.
2. Select the **Update Order Line** option. The system validates your entry. An error message displays if:
   - The number is greater than 9.
   - The number is a negative number.

3. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made.

> **Note:**
>
> The **Priority** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Update Coordinate Group Setting

1. Enter a number in the *Coordinate Group* field between 0 and 999.

   If the item on the order line has partially shipped, the **Coordinate Group** field is display-only.
2. Select the **Update Order Line** option. The system validates your entry. An error message displays if:
   - The number is greater than 999.
   - The number is a negative number.
3. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made.

The system does not perform pick slip preparation for items on the order with the same coordinate group number unless inventory is available for all of the items.

> **Note:**
>
> The **Coordinate Group** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Update Ship Via

1. Select a ship via from the *Ship Via* drop-down field.
   - If the current ship via assigned to the order is Express Bill, the **Ship Via** field displays only ship vias with a billing code of Express Bill (E).
   - If records exist in the Reserved Order Line table for the order line, the **Ship Via** field does not include ship vias with a billing code of Express Bill (E), Pick up (P), or Take (T).
   - If the order is a quote, the **Ship Via** field does not include ship vias with a billing code of Express Bill (E), Pick up (P), or Take (T).
   - Only ship vias that are valid for the SCF of the shipping address and for the item are available for selection.
   - The **Ship Via** field is display-only if the item on the order line has partially shipped.
2. Select the **Update Order Line** option. The system validates your entry. An error message displays if:
   - The ship via is not a valid ship via for the ship-to postal code.

3. If the update is successful, you return to the previous page and a message indicates that the update was made.
   - The item will ship by the new shipper.
   - If you enter an express bill ship via code, the item immediately goes through billing. A pick slip does not print and no shipments occur for the item.

> **Note:**
>
> Entering an express bill ship via is not recommended in Contact Center, because you may not be able to successfully complete the order update.

Update the Recalculate Shipping Setting

1. Update the *Recalculate Shipping* setting.
   - Select the **Recalculate Shipping** setting to recalculate shipping for the item based on changes to its quantity or price.
   - Deselect the **Recalculate Shipping** setting if you do not wish to recalculate shipping for the item based on changes to its quantity or price.
   - The setting of the **Recalculate Shipping** field defaults based on the setting of the **Recalculate Freight Default (F62)** system control value.
   - The **Recalculate Shipping** field is display-only if the order is a quote.
   - If the item on the order line has partially shipped, the **Recalculate Shipping** field is display-only.
2. Select the **Update Order Line** option.
3. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made.

> **Note:**
>
> The **Recalculate Shipping** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Update Shipping Charge

1. Select the *Recalculate Shipping* field to make the *Shipping* **Charge** field enterable.
2. Update the amount in the **Shipping Charge** field. The **Shipping Charge** field is display-only if:
   - The source code for the item does not use a line level freight method of Flat Rate/Item, Flat Rate/Quantity, Flat Rate/Item, or Weight, or
   - The item on the order line has partially shipped.
3. Select the **Update Order Line** option.
4. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made. The system uses the new shipping charge for the item.

Update Warehouse

1. Select a warehouse from the *Warehouse* drop-down field. If the item on the order line has partially shipped, the **Warehouse** field is display-only.
2. Select the **Update Order Line** option. The system validates your entry. An error message displays if the item is not valid for the warehouse.
3. If the update is successful, the system returns you to the previous page and displays a message indicating the update was made.

The system removes any existing inventory reservations for the order line and attempts to reserve the item on the order line in the new warehouse specified. If the item is not available in the warehouse specified, the system assigns this warehouse as the backorder warehouse for the unreserved quantity of the item on the order line.

> **Note:**
>
> The **Warehouse** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Fields on Edit Order Line

Purpose: The following information displays on the **Edit Order Line** panel.

- *Item Description* (unlabeled field below the **Edit Order Line** title)
- *Item ID* (unlabeled field to the right of the **Item Description)**
- *SKU Description* (unlabeled field below the **Item Description** and **Item ID**)
- **Quantity Ordered** (*Order Line Quantity Ordered*)
- *Cancel Reason*: Required only if you change the **Quantity Ordered** to a lower quantity.
- *No Charge*
- **Price** (*Order Line Price*). To set the price to zero, select *No Charge*.
- *Price Override Reason*
- *Offer*
- **Coupon** (*Order Line Coupon*): The **Coupon** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- **Coupon Amount** (*Order Line Coupon Amount*): The **Coupon Amount** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Gift Wrap*: The **Gift Wrap** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Affect Inventory*:
  - The **Affect Inventory** field is display-only if the item is a drop ship item.
  - The **Affect Inventory** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

- *User Hold*
- *Arrival Date*: The **Arrival Date** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Cancel Date*: The **Cancel Date** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- **Priority** (*Backorder Priority*): The **Priority** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Coordinate Group*: The **Coordinate Group** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Ship Via*: The **Ship Via** field is display-only if the item on the order line has partially shipped. If the item requires a ship via override, only valid ship vias for the item are available for selection.
- *Recalculate Shipping*:
  - The *Recalculate Freight Default (F62)* system control value controls the default setting of this field, but you can override this default.
  - The **Recalculate Shipping** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Shipping*:
  - The **Shipping Charge** field is display-only if:
  - The source code for the item does not use a line level freight method of Flat Rate/Item, Flat Rate/Quantity, Flat Rate/Item, or Weight, or
  - The item on the order line has partially shipped.
- *Warehouse*: The **Warehouse** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

For more information:

- *Edit Order Line* for an overview of the **Edit Order Line** panel.
- *Edit Order Line Options* for step-by-step instructions on the actions you can perform on the **Edit Order Line** panel.

35 Return Order Line

Purpose: Use the **Return Order Line** panel to return or exchange a full or partial shipped quantity of an order line on an order.

How to display: Select the **Return** option for an order line on the *Order Lines Panel* of the *Order Summary* page.

Requirements to return an order line:

- There has been at least one shipment on the order line and an unreturned quantity.
- The order is not currently locked by another user or session, or by the system.
- You have authority to the **Enter/Maintain Orders (OEOM)** menu option and *Order Maintenance Access (A22)* secured feature,
- You have authority to the *Enter Return Authorization (A28)*, *Receive Return Authorization (A29)*, and *Credit Return Authorization (A34)* secured features.
- You have authority to the *Maintain Order with Printed Quantity (J05)* secured feature if there is a printed quantity on any order line.
- For a brokered backorder, you have authority to the *Maintain Brokered Fulfillment Orders (B20)* secured feature if the order is from Order Orchestration.
- If the *Payment at POS for Ship for Pickup (L60)* system control value is selected, the order is not a ship-for-pickup order, based on the *Broker Delivery Type*.
- If the *Suppress Returns for Retail Pickup/Delivery (L88)* system control value is selected, the order is not a retail pickup or delivery order, based on the *Broker Delivery Type*. This exclusion applies regardless of whether the order originated in Order Administration or in an external system, such as Xstore.
- The order is not a store pickup order.

Any time you select to update the information on an order, the system locks the order so that it cannot be maintained by another user while you are making updates; see *Display of a Locked Order*.

Return or exchange updates: When you process the return or exchange, updates include:

- An inventory transaction is processed if you use a return disposition value set to update inventory.
- When inventory is updated, an item location record is created if it did not already exist.
- An *Order Line Activity* record is created for the return or exchange.
- The *Returned Quantity* for the order line is updated.
- A refund is created based on the value of the returned quantity and any freight, tax, or charges. See *Returns/Refunds*.

> **Note:**
>
> If you use net exchange billing, you should not process returns in Contact Center, and should use Classic View instead.

For more information:

- *Return Order Line Options* for step-by-step instructions on the actions you can perform on the **Return Order Line** panel.
- *Fields on Return Order Line* for a description of the fields on the **Return Order Line** panel.

Return Order Line Options

Purpose: You can use the **Return Order Line** panel to return or exchange a full or partial quantity of an order line.

For more information:

- *Return Order Line* for an overview of the **Return Order Line** panel, including the conditions when you can process a return and the updates made.
- *Fields on Return Order Line* for a description of the fields on the **Return Order Line** panel.

To return an order line:

1. Select **Return** for an order line at the *Order Lines Panel* of the **Order Summary** page. See *Return Order Line* for information on when the Return option is available.
2. Select *Return With Exchange* to also enter a replacement item to ship to the customer; otherwise, leave this field unselected if this is a simple return. If you select **Return with Exchange**, the additional **Exchange Details** fields are displayed to the right.

   > **Note:**
   >
   > The option to Return with Exchange is not available for a retail pickup or delivery order, based on the order's *Broker Delivery Type*.

3. Enter the *Quantity to Return*. You cannot return more than the *Unreturned Quantity* displayed in the upper portion of the panel.

   > **Note:**
   >
   > Unlike order maintenance in the Classic View of Order Administration, the **Return Order Line** panel enables you to return multiple units of a ship-alone item in a single return transaction.

4. Select a *Return Reason* if you are not processing an exchange.

5. The *Return Disposition* defined in the *Default Disposition Code (C18)* system control value defaults.The return disposition controls whether to return the item to inventory and, if so, it can also define the warehouse and warehouse location where the item is returned. Optionally, you can change the return disposition to another return disposition that you have authority to. See *Return Disposition User Authority* background. Also, see *Return Disposition Scenarios* for a discussion.
6. Depending on the selected *Return Disposition*, the *Warehouse* may default. If the return disposition indicates to update inventory, the *Warehouse* is required. However, besides the warehouse defined for the return disposition, if any, only warehouses that have a record of the item are available for selection.
7. Depending on the selected *Return Disposition*, the *Warehouse Location* may default, or you may need to select it. However, besides the warehouse location defined for the return disposition, if any, only warehouse locations that have a record of the item are available for selection.

> **Note:**
>
> You may need to select **Return** to have the warehouse and location update based on the selected return disposition.

Windows displaying warning messages: You might see one or more windows asking if you would like to create a primary location for the item, or indicating that a primary location does not already exist. The *Allow Multiple Primary Item Locations (D12)* system control value controls whether you can create more than one primary location, or whether to simply display a warning message; the **Display** “*No Primary Location Message in Returns (G46)* system control value controls whether to display a warning message if there is no primary location defined for the item.

Displayed when? These messages might be displayed if there is not already a record of the returned item in the warehouse location that defaults to this panel, but a primary location for the item already exists; You might also see the message about multiple primary locations when processing the return of an item that has no warehouse location records, such as a *Drop Ship* item.

8. Optionally, select one or more of the following:
   - *Refund Shipping*: If you select **Refund Shipping** and a freight override was applied to the order, the *Current Shipping Amount* indicates the remaining unrefunded shipping charges on the order. For example, you can apply a freight override at the Work with Order Ship To Properties screen in the Classic View of Order Administration. You cannot refund more than this amount for shipping. You can then enter the *Shipping Refund Amount*. This amount cannot exceed the *Current Shipping Amount*.

   Note: If you return an additional item in the current session, the *Current Shipping Amount* displayed reflects the amount you specified to refund when returning the previous item. For example, if the total **Current Shipping Amount** was $50.00 when you returned the first item, and you specified a *Shipping Refund Amount* of $10.00, the **Current Shipping Amount** displayed for the second item is $40.00.

   - *Refund Additional Charges*
   - *Refund Personalization*
   - *Refund Duty Charges*

Return with Exchange:

If you selected *Return With Exchange*, complete the **Exchange Details** fields:

1. Select an *Exchange Reason*.
2. Enter the *Item ID* to replace the returned item, including the *SKU* if this is a SKU'd item. See *Search for an Item or SKU* for information on searching for the item and SKU code based on description, keywords, or item ID.

   Search results: If there is more than one search result, results are displayed in the **Item Search** window, where you can further filter the results, or click **Select Item** to select an item as the replacement. The options at this window are the same as those described under *Search for an Item or SKU* and *Add an Item or SKU*, except that if the exchange item you select has SKU's, you first select the SKU'd item at the **Item Search** window, and then select the SKU at the **Return Order Line** panel.

   Note: Do not enter the following types of items as exchange items:

   - A virtual gift (stored value) card item to the order if there is not an email address for the customer.
   - A membership item.
   - An item with a ship via override.
   - An item that requires standard personalization, in which you enter free-form text only.
3. Enter the **Quantity** to send of the exchange item.Up to 5 positions. No quantity defaults.

   Note: If the specified quantity is larger than the *Maximum Order Quantity (C60)* system control value and you do not have authority to the *Allow Maximum Order Quantity Override* secured feature, a quantity of 1 is added to the order.
4. Select the *Exchange Pricing* method for the exchange.
5. If you select **Override Price** as the *Exchange Pricing* method, enter the *Price Override* amount and the *Price Override Reason*.

   Exchange pricing troubleshooting:

   - If you do not have authority under the **Price Overrides** secured feature, an exchange pricing method of **Normal Pricing** defaults, and you cannot change it.
   - Even if you have authority to override prices, the percentage you can discount the existing price may be limited by the *Price Override Limit Percent (E55)* system control value, unless you have authority to the *Override Price Override Limit* secured feature, which allows you to override the limit percent from the system control value.
   - The *Price Override Reason for Same Price Exchanges (D92)* system control value must specify a price override reason in order for you to use the **Existing Price** setting.
   - You cannot add the item at price that is greater than the value set in *Maximum Order Line Value (E98)* if you do not have authority to the *Allow Maximum Order Line Value Override (A69)* secured feature.

- If the exchange item is a warranty item, it is added to the order at no charge and a price override reason defaults. You cannot override the price for a warranty item.
- If a price override error occurs, select **Cancel** and then select **Return** again for the item at the Order Summary page in order to restart the exchange.

6. If the *Require Reason for Lines Added in Order Maintenance (D75)* system control value or the **Required reason code** flag for the item offer or SKU offer is selected, select the *Add Line Reason*.
7. If the ship via defined for the order is not valid for the item. In this situation, the system displays the *Ship Via* field where you must select a valid ship via for the item. The first valid ship via in alphanumeric order defaults, but you can override it.
8. **Submit the return or exchange:** Select **Return** to submit the return or exchange.

Returning a main set item: When you select the *Main Set Item* item to return rather than individual components, you advance through the *Return Order Line* panel for each of the components as well as for the main set item itself. In this situation:

- You select **Submit Item and Continue** rather than **Return** to advance through the *Return Order Line* panel for each component item.
- The selected settings from the previous item default for each subsequent item; however, you can choose different selections. For example, you can select a different return disposition.
- If you select **Cancel** at any point, this does not cancel the entire return of the set and components. Instead, returns are still processed for the main set item and any other components for which you have already selected **Submit Item and Continue**.

After entry of an exchange item: If your entries pass validation and you have entered an exchange item, the system:

- Displays the *Item SKU Information* window if the item added is associated with item/SKU status messages and/or item/SKU comments whose **Print Code** is set to **W Window**.
- If the item added is a warranty item, applies the price override reason defined in the *Default Price Override Reason for Warranty Items (G01)* system control value to the order line.
- Reserves the item if you use immediate reservation.
- Updates the order totals.
- If the item added is a variable set, you advance to the *Select Variable Set Items* page.
- Otherwise, you return to the previous page with the newly added item in the *Order Lines Panel*.
- If you order a virtual gift card item (the **SVC type** field for the item is **V Virtual**), the system requires you to define an email address in order to send a gift card notification (Stored Value Card Notification Email) to the recipient of the gift card. If an email address is not defined, the system displays an error message when you select to unlock the order; in this situation, you need to cancel the virtual stored value card from the order.
- If the item has associated coordinate items, a message indicates this fact. You can use the **Add Coordinate Items** option for the order line to advance to the *Select Coordinate Items* page, where you can review coordinates or add them to the order.
- If the item offer or SKU offer requires personalization based on the assignment of a **S/H Code** to the item offer or SKU offer, and there is not an item class restriction against personalization, you advance to the *Add Personalization* window.

- When you unlock the order, if the order's status was previously Closed or Canceled, it resets to Open status.

> **Note:**
>
> You do not need to enter an add reason code when adding an exchange item, regardless of the setting of the *Require Reason for Lines Added in Order Maintenance (D75)* system control value.

Fields on Return Order Line

Purpose: The fields on the *Return Order Line* panel are listed below.

> **Note:**
>
> The **Order** (*Order Number*) is indicated in parentheses after the panel title.

- *Item ID*: The shipped item you selected for return at the *Order Lines Panel* of the *Order Summary* page. Display-only.
- *Item Description*. Display-only.
- *SKU Description*: Included only if the item has SKU's. Display-only.
- Unreturned Line Quantity (*Unreturned Quantity*): You cannot return or exchange more than this quantity. Display-only.
- *Return With Exchange*: Optionally, select this option to process an exchange for the returned unit(s). When you select this option, the **Exchange Details** options are displayed to the right.

> **Note:**
>
> The option to return with exchange is not available for retail pickup or delivery orders.

- *Quantity to Return*. Required. Cannot exceed the unreturned line quantity.
- *Return Reason*. Required unless the *Return With Exchange* flag is selected; in that case, you need to complete the *Exchange Details*.
- *Return Disposition*. Defaults from the *Default Disposition Code (C18)* system control value . See *Return Disposition Scenarios* for background on the field requirements at the **Return Order Line** panel based on the selected return disposition. Required.
- *Warehouse*. The warehouse where the returned item will be received. This value is used only if the disposition code affects inventory. If there is only a single existing Item Warehouse record for the item, you cannot select a different warehouse. Also, if a warehouse is defined for the return disposition code, this warehouse defaults. May be required based on the return disposition.

- *Warehouse Location*. The physical location within the warehouse where the returned item will be received. This value is used only if the disposition code affects inventory. If there is only a single existing Item Location record for the item, you cannot select a different location; however, if the return disposition defines a default return location and warehouse, such as returns location in a virtual returns warehouse, this warehouse and location default. May be required based on the return disposition.
- *Refund Shipping*. Optional.
- *Current Shipping Amount*. The remaining unrefunded shipping charges on the order. Displayed only if you select **Refund Shipping** and a freight override was applied to the order. For example, you can apply a freight override at the Work with Order Ship To Properties screen in the Classic View of Order Administration. You cannot refund more than this amount for shipping.
- *Shipping Refund Amount*. Optionally, enter the shipping amount to refund for the return. You can enter a shipping refund amount only if you select **Refund Shipping** and a freight override was applied to the order. This amount cannot exceed the *Current Shipping Amount*.
- *Refund Additional Charges*. Optional.
- *Refund Personalization*. Optional.
- *Refund Duty Charges*. Optional.

Exchange Details

Complete the exchange details if the *Return With Exchange* option is selected:

- *Exchange Reason*. Required.
- *Item ID*. Required.
- *SKU*. Required if the item has SKU's.

> **Note:**
>
> Do not enter the following types of items as exchange items:
>
> - A virtual stored value card item to the order if there is not an email address for the customer.
> - A membership item.
> - An item with a ship via override.
> - An item that requires standard personalization, in which you enter free-form text only.

- **Quantity:** The *Ordered Quantity* for the exchange. Up to 5 positions. No quantity defaults. Required.

Note: If the specified quantity is larger than the *Maximum Order Quantity (C60)* system control value and you do not have authority to the *Allow Maximum Order Quantity Override* secured feature, a quantity of 1 is added to the order.

- *Exchange Pricing*: Controls how to price the exchange item added to the order. Required.
- *Price Override*: The unit price for the exchange item. Required if you select **Price Override** as the *Exchange Pricing*; otherwise, not displayed.

- *Price Override Reason*: Required if you select **Price Override** as the *Exchange Pricing*; otherwise, not displayed.

  Exchange pricing troubleshooting:

  – If you do not have authority under the **Price Overrides** secured feature, an exchange pricing method of **Normal Pricing** defaults, and you cannot change it.

  – Even if you have authority to override prices, the percentage you can discount the existing price may be limited by the *Price Override Limit Percent (E55)* system control value , unless you have authority to the *Override Price Override Limit* secured feature, which allows you to override the limit percent from the system control value.

  – The *Price Override Reason for Same Price Exchanges (D92)* system control value must specify a price override reason in order for you to use the **Existing Price** setting.

  – You cannot add the item at price that is greater than the value set in *Maximum Order Line Value (E98)* if you do not have authority to the *Allow Maximum Order Line Value Override (A69)* secured feature.

  – If the exchange item is a warranty item, it is added to the order at no charge and a price override reason defaults. You cannot override the price for a warranty item.

  – If a price override error occurs, select **Cancel** and then select **Return** again for the item at the Order Summary page in order to restart the exchange.

- *Add Line Reason*: Displayed and required if the *Require Reason for Lines Added in Order Maintenance (D75)* system control value or the **Required reason code** flag for the item offer or SKU offer is selected.
- *Ship Via*: Displayed and required if the exchange item requires a ship via override.

For more information:

- *Return Order Line* for an overview of the **Return Order Line** panel.
- *Return Order Line Options* for step-by-step instructions on returning or exchanging an order line.

36
Select Coordinate Items

Purpose: Use the **Select Coordinate Items** window to add an item to an order if it is associated to an existing item on the order as a coordinate.

The system assigns the next available line number to the item you are adding to the order. The system performs the same item updates and validations as in order entry, such as:

- Reserving the item (if using immediate reservation).
- Updating order totals.
- Performing credit checking to ensure the order has valid customer and payment information.

Display backordered coordinates? The *Display Backordered Coordinate Sale Items (F41)* system control value controls whether to display coordinate items if they are backordered. If you want to provide the option to order backordered coordinates because they can be fulfilled through the Order Broker, you should select this system control value.

How to display from the Order Summary page: Select **Coordinate** from the actions menu (⋮) in the *Order Lines Panel* for an order line of the *Order Summary* page.

In order to add a coordinate item:

- The order cannot be currently locked by another user, the system, or another session.
- The order cannot be a store pickup order, based on the *Broker Delivery Type*.
- The order cannot be from Order Orchestration (delivery, retail pickup, or pickup), based on the *Broker Delivery Type*.
- The item must have coordinate items associated with it. For example, if the item is a hat, there might be gloves or a scarf associated with it as coordinates.
- The order type cannot have the **Promo windows** flag set to **None**.

> **Note:**
>
> The window is blank if *Display Backordered Coordinate Sale Items (F41)* system control value is selected and there are no available coordinates.

How to display in Order Entry:

- The window opens automatically in *Order Entry* when you add an item to the order if it has one or more coordinate items associated with it, provided the *Automatically Display Coordinate Items in Order Entry (I53)* system control value is selected and the **Promo** flag for the order type defined in the *Default Order Type (B28)* system control value is set to **Promo Price**.
- You can also open this window by selecting **Coordinates** from the action menu for the item in the **Order Summary** panel, as described above; however, the window does not

open automatically if you add an item that has one or more coordinate items associated with it to an existing order.

> **Note:**
>
> The window does not open and is not available in order entry if *Display Backordered Coordinate Sale Items (F41)* system control value is selected and there are no available coordinates.
>
> The window does not open automatically in *Order Entry* when you copy an item to the order within a multiple ship-to order.

In order to add a coordinate item:

- When you are maintaining an existing order, the order cannot be a store pickup order, based on the *Broker Delivery Type*.
- The item must have coordinate items associated with it. For example, if the item is a hat, there might be gloves or a scarf associated with it as coordinates.

For more information:

- *Select Coordinate Items Options* for step-by-step instructions on the actions you can perform on the **Select Coordinate Items** window.
- *Fields on Select Coordinate Items* for a description of the fields on the **Select Coordinate Items** window.

Select Coordinate Items Options

Purpose: You can add one item at a time to the order on the **Select Coordinate Items** window.

For more information:

- *Select Coordinate Items* for an overview of the **Select Coordinate Items** wimdow.
- *Fields on Select Coordinate Items* for a description of the fields on the **Select Coordinate Items** window.

Add a Coordinate Item to the Order

1. Identify the coordinate item to add. If multiple SKU's for the item are available for selection, select the *SKU* (unlabeled) field to display the SKU drop down list, and enter a full or partial SKU in the drop down list search field to find SKU's that contain your entry.

   > **Note:**
   >
   > See *Fields on Select Coordinate Items* for information on which coordinates are available for selection based on system configuration options and item settings.

2. If required for the item, select a **Ship Via Override**. This is required if one or more ship via overrides are defined for the item.
3. Enter the quantity of the item you wish to add to the order in the *Order Line Quantity Ordered* (unlabeled) field.
4. Select the **Add to Order** option. The system validates your entries. An error message displays if:
   - A number is not defined in the **Quantity** field, the number is negative, or the number is greater than 99,999.
   - The number in the **Quantity** field is greater than the number in the *Maximum Order Quantity (C60)* system control value and you do not have authority to the *Allow Maximum Order Quantity Override (A70)* secured feature.
   - The item is flagged as **Restricted**, indicating that it cannot be ordered.
5. If your entries pass validation, the system:
   - Reserves the item if you use immediate reservation.
   - Updates the order totals.
   - Returns you to the Order Summary page or to your current step in order entry, and displays the newly added item in the *Order Lines Panel*, or to the *Order Summary Panel* if you are in order entry.
6. When you unlock the order, if the order's status was previously Closed or Canceled, it resets to Open status.

Adding additional coordinates: Select **+ Coordinate** from the *Order Lines Panel*, or **Coordinates** for the item in the **Order Summary** panel in order entry, and repeat the above steps for each component you would like to add to the order.

Fields on Select Coordinate Items

Purpose: The following information displays on the **Select Coordinate Items** window.

- *Item Image*: Displays only if the *Use External Item Image (L55)* system control value is selected.
- *Item Description* and *Item ID*: The item on the order that is associated with the displayed coordinate items. Unlabeled, in parentheses.
- *SKU Description*. Unlabeled.

For each coordinate item that is available for selection:

- *Item Image*: Displays only if the *Use External Item Image (L55)* system control value is selected.
- *Item Description* and *Item ID* (unlabeled, in parentheses)
- **Item coordinate message:** A message specified to display information about the coordinate item in this window. Unlabeled.
- *Item Description*
- **Unit Price** (*Order Line Price*). In *Order Entry*, shows the price from the default *Current Offer (A33)*; however, when you advance to the *Review Order and Verify Order Information* step, the price is updated to the price from the offer associated with the source code specified at the *Enter or Verify Customer Information*. The price displayed

may also be updated when you select a different SKU, depending on which SKUs have prices that are different than the price at the item level.

- *Item Image*. If no image is defined for the item, a message indicates `Image Not Available`.
- **Available** (*Warehouse Available*). Not displayed in order entry.
- *SKU*. Required to add a SKU of the coordinate item to the order and available for selection only if multiple SKU's are coordinated with the selected item. For example, you can configure item coordinate selection to display only blue SKU's of the coordinates if the selected item is blue. See **Working with Item Coordinates (WCIO)** in the Classic View online help for a discussion on setting up item and SKU coordinates.
- **Ship Via Override** (*Ship Via*): Displayed only if the ship via defined for the order is not valid for the coordinate item. In this case, you need to select a different ship via to add the coordinate to the order.
- **Quantity** (*Order Line Quantity Ordered*)

Which coordinates are listed?

- **Display backordered coordinates?** The *Display Backordered Coordinate Sale Items (F41)* system control value controls whether to display coordinate items if they are backordered or have zero available. If all coordinate items are backordered and this system control value is unselected, no coordinate items are displayed in this window when you open it from *Order Lines Panel* of the *Order Summary* page, and the window does not open automatically and is not available in *Order Entry*.
- **Items must be included in offer:** Items are included in the Select Coordinate Items window only if they are included in the offer associated with the order, based on the source code on the order header.
- **Restricted items:** Restricted items are listed in the window if they are defined as coordinates, but they cannot be ordered.
- **Soldout items:** Soldout items are listed in the window if they are defined as coordinates, and you can add them to the order; however, the price of a soldout item is not included in the merchandise total on the order.

Display sequence: Coordinates are displayed in sequence based on the **Sequence** number, if any, assigned to each item coordinate. If one or more coordinates have the same sequence number assignment, they are displayed in alphanumeric order by item ID.

For more information:

- *Select Coordinate Items* for an overview of the **Select Coordinate Items** window.
- *Select Coordinate Items Options* for step-by-step instructions on the actions you can perform on the **Select Coordinate Items** window.

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Select Variable Set Items

Purpose: Use the **Select Variable Set Items** window to select the items from a variable set to add to an order. Variable sets consist of several component items that the customer can select to make up the desired set. A variable set, for example, may be a special promotion such as, "...Choose any 2 slacks, 1 jacket, and 1 belt from this page."

About variable sets: A variable set item enables the customer to select a set number of components from one or more groups. For example, a variable set may include a group for slacks, another for jackets, and a third for belts.

The customer must select the specific item(s) desired from each group at the **Select Variable Set Items** page to satisfy the requirements of the variable set (such as, 2 slacks, 1 jacket, and 1 belt). The system ensures that the customer orders the correct quantity from each variable set group by maintaining a counter of the number of items allowed as compared to the number of items ordered.

When you complete the **Select Variable Set Items** page by selecting the correct number of component items for each group, the system adds the lines to the order for each component item selected. The variable set item itself is not retained on the order.

The system assigns the next available line number to the item you are adding to the order. The system performs the same item updates and validations as in order entry, such as:

- Reserving the item (if using immediate reservation).
- Updating order totals.
- Performing credit checking to ensure the order has valid customer and payment information.

How to display: Complete the *Add Item* page for a variable set item.

In order to add a variable set and its components:

- The order cannot be currently locked by another user, the system, or another session.
- The order cannot be a store pickup order, based on the *Broker Delivery Type*.
- The order cannot be from Order Orchestration (delivery, retail pickup, or pickup), based on the *Broker Delivery Type*.
- The variable set item must be configured with its component items.

For more information:

- *Select Variable Set Items Options* for step-by-step instructions on the actions you can perform on the **Select Variable Set Items** window.
- *Fields on Select Variable Set Items* for a description of the fields on the **Select Variable Set Items** window.

Select Variable Set Items Options

Purpose: Use the **Select Variable Set Items** window to select the required number of component items for each component group defined for the variable set, such as, 2 slacks, 1 jacket, and 1 belt. The system ensures that the customer orders the correct quantity from each variable set group by maintaining a counter of the number of items allowed as compared to the number of items ordered.

For more information:

- *Select Variable Set Items* for an overview of the **Select Variable Set Items** window.
- *Fields on Select Variable Set Items* for a description of the fields on the **Select Variable Set Items** window.

Select the Variable Set Components to Add to the Order

1. Select the quantity of each component item in the group that you wish to add to the order in the *Order Line Quantity Ordered* (unlabeled) field. An error message displays if:
   - A number greater than 0 is not defined in the **Quantity** field, the number is negative, or the number is greater than 99,999.
   - The number in the **Quantity** field is greater than the number in the *Maximum Order Quantity (C60)* system control value and you do not have authority to the *Allow Maximum Order Quantity Override (A70)* secured feature.
   - The **Items Selected** quantity exceeds the **Items Required** quantity. Reduce the quantity of one or more items until the **Items Required** is no longer exceeded.

   If an item requires a ship via override, select a *Ship Via*.

   As you add each item or increase the quantity, the **Items Selected** increases.
2. To proceed after selecting variable set components:
   - Select **Next** when the **Items Selected** is equal to the **Items Required** for the group if there is one or more additional groups in the variable set and you have completed selection for the displayed group.
   - Select **Previous** if you would like to change the selections in the previous group.
   - Select **Cancel** if you would like to cancel adding the variable set items to the order.
   - Select **Add to Order** when the **Items Selected** is equal to the **Items Required** for all variable set groups. The system validates your entries.
3. If you select **Add to Order** and your entries pass validation, the system:
   - Reserves the item if you use immediate reservation.
   - Updates the order totals.
   - Returns you to the **Order Summary** page and displays the newly added items in the *Order Lines Panel*.

4. When you unlock the order, if the order's status was previously Closed or Canceled, it resets to Open status.

Fields on Select Variable Set Items

Purpose: The following information displays on the **Select Variable Set Items** window.

- *Item Description* of the variable set item.
- Number and description of each variable set *Group*. There can be multiple groups for a variable set, each containing various component items. The customer must select a defined number of items from each group.
- **Items Required:** The number of items the customer must select from the group; for example, Group 1 is Ties, and the customer selects 3 ties.
- **Items Selected:** The number of items that have been selected from the group. Incremented each time an item is selected.

For each component item of the selected variable set item in the group:

- *Item Description* (*Item ID* in parentheses)
- *SKU* description; displayed above the **Quantity** only if the item has SKU's
- **Quantity** (*Order Line Quantity Ordered*)
- **Price** (*Order Line Price*). Display-only. A price of 0.00 is displayed if no price is defined for the item or SKU in the offer.

A note below the item description indicates if the item is eligible for personalization.

- **Override** or **Shipping Override** (*Ship Via*): Displays only if the ship via defined for the order is not valid for the component item. In this case, you need to select a different ship via to add the component to the order.

For more information:

- *Select Variable Set Items* for an overview of the **Select Coordinate Items** window.
- *Select Variable Set Items Options* for step-by-step instructions on the actions you can perform on the **Select Coordinate Items** window.

38
Cancel Order Line

Purpose: Use the **Cancel Order Line** window to cancel an order line on an order.

You can cancel the open (unshipped) quantity of the item. If the quantity you cancel is reserved, it will now be available for other orders.

How to display: Select the **Cancel** option from the actions menu (⋮) for an order line on the *Order Lines Panel* of the *Order Summary* page.

To cancel an order line:

- The order line must be in an open or held status, and not locked by another user.
- The item on the order line cannot have a printed pick slip; in this situation, you must first void the pick slip before you can cancel the item.
- If the order line contains a set component item, you must have authority to the *Set Component Maintenance (J01)* secured feature.
- The order cannot be a store pickup order or received from Order Orchestration (delivery or pickup), based on the *Broker Delivery Type*, if you do not have authority to the *Cancel Order Broker Lines (B19)* secured feature.
- The order cannot be received from Order Orchestration (delivery or pickup), based on the *Broker Delivery Type*, if you do not have authority to the *Maintain Brokered Fulfillment Orders (B20)* secured feature.

In this topic:

- *Order Orchestration and Item Cancellation*
- *Canceling Membership Items*
- *Cancellation Email*

For more information:

- *Cancel Order Line Options* for step-by-step instructions on the actions you can perform on the **Cancel Order Line** window.
- *Fields on Cancel Order Line* for a description of the fields on the **Cancel Order Line** window.

Order Orchestration and Item Cancellation

The *Cancel Order Broker Lines (B19)* secured feature controls the ability to cancel backordered lines that are assigned to the Order Broker for fulfillment (brokered backorders), store pickup orders, and orders received from the Order Broker (delivery or pickup).

> **Note:**
>
> This secured feature does not control authority to ship-for-pickup orders.

Canceling a Brokered Backorder Order Line

When you cancel an order line that is currently assigned to the Order Broker for fulfillment, the system cancels both the brokered backorder request and the order line itself to prevent the order line from shipping to the customer. If you cancel part of the order line, any remaining uncanceled quantity returns to standard backorder and warehouse processing in Order Administration.

In addition:

- If the order has not yet been sent to the Order Broker (the status of the Order Broker request is **R (ready)**, the status of the Order Broker request changes to **C (closed)**. No further updates take place.
- If the order has been sent to the Order Broker (the status of the Order Broker request is **W (waiting)**, **K (acknowledged)**, **P (polled)**, or **A (accepted)**: the status of the Order Broker request changes to **Y (pending cancel)**. Once the BROKER job receives confirmation of the cancellation from the Order Broker, it changes the status of the Order Broker request to **Z (canceled)**, and writes an Order Transaction History message (for example, `Ln#: 2 Cancel Acknowledged by Broker`).
- Before canceling a brokered backorder request, it is important to confirm that the assigned fulfilling location is not in the process of shipping it. Even if the current status in Classic View (Order Administration) and Contact Center indicates that the order is not in the process of fulfillment, depending on the setting of the *Order Broker Status Update Interval (K10)* system control value, this information could be out of date.
- A brokered backorder request is eligible for cancellation only if its status is:
  - **A - Accepted** = The assigned fulfilling location has accepted the order.
  - **K - Acknowledged** = The Order Broker has received the order request, assigned a request ID, selected a fulfilling location, and created the order in its database.
  - **P - Polled** = The assigned fulfilling the location has polled the Order Broker for new orders and been notified of this order.
  - **R - Ready** = The request is ready to be sent to the Order Broker, but the BROKER process has not yet generated the request message.
  - **W - Waiting** = The order request message has been sent to the Order Broker, but Order Administration has not yet received the response.
- If the *Use OROB for Fulfillment Assignment (M31)* system control value is selected you can cancel the delivery order that was created to fulfill the originating broker backorder. In this situation, the system changes the Order Broker record’s status to Canceled and sends a status inquiry request to the Order Broker.
- If you broker ship-for-pickup orders for fulfillment assignment (the *Use OROB for Ship for Pickup Fulfillment Assignment (M34)* system control value is set to **ALWAYS** and the *Send B/O to OROB (K08)* system control value is selected), when you cancel a ship-for-pickup order, the system sends an update to Order Orchestration so that the order can be updated to canceled. In addition, if a pickup order was created in Order Administration to fulfill the ship-for-pickup order, when you run pick slip generation for the pickup order, the system does not generate a pick slip and assigns the hold reason defined in the Order Broker Hold Reason (Cancel) (L02) *system control value to the order.* The system also writes an order

transaction history message for the pickup order indicating to order is held due to lines canceled in Order Orchestration.

Canceling an Order Line on an Order Received from Order Orchestration

If you cancel an item on an order received from Order Orchestration (delivery or pickup), the system changes the Order Orchestration record's status to **Canceled** and sends a status inquiry request to the Order Broker. If the order's status in Order Orchestration is:

- **Canceled**: the system does not send a status update to Order Orchestration; otherwise,
- If the order's status in Order Orchestration is anything but **Canceled**, the system sends a status update to Order Orchestration indicating the status is **Rejected**. In this situation, the Order Broker then changes the order status to **New_order**.

If Order Orchestration is configured to "reshop" (the **Search retries** setting at the Preferences screen is not set to **0**), then in this situation the Order Broker attempts to assign the order to another location for fulfillment.

> **Note:**
>
> Although the system does not prevent you from canceling an order from Order Orchestration, some business processes require that only the originating location can cancel an order. In this situation, if the customer contacts the contact center to cancel the order, the operator notifies the originating store location and requests that the store perform the cancellation and trigger the status update to Order Orchestration. Using this process, the system receives notification of the cancellation the next time it sends a periodic status inquiry on the order to Order Orchestration, and then holds the entire order (even if only one line was canceled) using the hold reason code defined in the *Order Broker Hold Reason (Cancel) (L02)* system control value.

Canceling Membership Items

If you cancel a membership item, the system also cancels the customer membership if possible.

When is Customer Membership Eligible for Cancellation?

In order for the system to cancel the customer membership created by the membership item:

- The membership item must be eligible for cancellation; that is, it cannot yet be billed.
- The customer membership must be in an **Active** or **Inactive** status.

Also, the customer membership must be a standard (non-loyalty) membership. You cannot cancel loyalty memberships through order maintenance, because you do not create these memberships by selling a membership item; instead, the system creates loyalty memberships based on the customer's order or sales activity. Only customer memberships you sell in order to generate orders or provide a discount are eligible for cancellation through cancellation of the related membership item.

What if the Customer Membership has Already been Canceled?

If you have already canceled the customer membership through the **Work with Customer Memberships (WWCM)** menu option and you then cancel the membership item, the system simply cancels the membership item on the order like any other item.

Canceling a Single Membership on an Order that Created Multiple Customer Memberships

It is possible to create more than one customer membership on an order by adding multiple membership items. If the system cannot determine which customer membership was created as the result of the membership item being canceled, the **Membership Program** field displays so you can select the correct membership to cancel. This situation can occur if you use a generic membership item to create different types of customer memberships, or if the customer has ordered two of the same membership item (for example, one for himself and one for a friend). You can use the **Membership Program** field to select the correct customer membership to cancel.

What if you have Already Generated Orders for the Customer Membership?

You can still cancel the membership item and prevent the customer membership from generating any subsequent orders, even if you have already used the **Generate Membership Orders (EGMO)** menu option to generate an order for the membership. In this situation, the system displays a message indicating that you need to cancel the generated membership order(s) if the customer does not want to receive shipments.

If the membership generation is currently in process, or if the customer membership is in **In process** status because the generated order is suspended in batch, the system displays a message indicating that you need to cancel the customer membership through the **Work with Customer Memberships (WWCM)** menu option.

Does the System Cancel Customer Memberships Automatically in any Other Situations?

When you use the **Void/Cancel** option in **Reprint and Void Pick Slips (WVRP** or **WSVP**), the system also cancels the related customer membership if the order includes a membership item. In this situation, the system uses the same logic as in order maintenance to determine whether to display a window.

The system does not automatically cancel customer memberships through any other screen or process. For example, if you cancel an order or membership item through the e-commerce interface, you need to use the **Work with Customer Memberships (WWCM)** menu option to cancel the related customer membership.

No Membership Cancellation Email Generated

When you cancel the membership item in order maintenance, the system does not generate the membership cancellation confirmation email regardless of the setting of the *Membership Cancellation Email Program (K77)* system control value.

Cancellation Email

The system generates an order or order line cancellation email or the Outbound Email XML Message (CWEmailOut) to the customer if:

- You have specified an *Order Line Cancellation Email Program (K79)*, if there is still at least one open line on the order or if there have been any shipments, or *Order Cancellation Email Program (K78)*, if you are canceling the last open line on the order and there have not been any shipments, and
- The cancel reason code you use does not match the *Cancel Reason Code to Suppress Email (L08)*, and
- The customer is eligible to receive email notifications.

If you generate the Outbound Email XML Message (CWEmailOut), the cancel reason code indicated is the last one used to cancel a quantity of the order line.

Cancel Order Line Options

Purpose: You can perform the following actions on the **Cancel Order Line** window.

- *Cancel Order Line*

For more information:

- *Cancel Order Line* for an overview of the **Cancel Order Line** window.
- *Fields on Cancel Order Line* for a description of the fields on the **Cancel Order Line** window.

Cancel Order Line

1. If multiple membership programs are included on the order and the system cannot determine which membership program to cancel, select the membership program you wish to cancel from the *Membership Program* field. This situation might occur if, for example, you the same membership item to the order twice to create two different membership programs for the customer.
2. Select a cancel reason from the *Cancel Reason* field. The *Quantity to Cancel*, displayed above, is the total quantity for the order line that has not been shipped, canceled, or sold out.
3. Select **Submit Cancellation**. The system validates your entry. An error message displays if:
   - There are multiple membership programs on the order and you do not select a membership program from the **Membership Program** field.
   - A cancel reason has not been defined in the **Cancel Reason** field.
4. If the update passes validation, the system:
   - Performs the cancellation of the displayed *Quantity to Cancel*; see *Item Cancellation Updates*.
   - Performs additional updates if the item is a brokered backorder; see *Canceling a Brokered Backorder Order Line*.
   - Performs additional updates if the item is on an order received from Order Orchestration (delivery or pickup); see *Canceling an Order Line on an Order Received from Order Orchestration*.
   - Performs additional updates if the item is a membership item; see *Canceling Membership Items*. In addition:

  - If membership orders have already been generated for the membership, the system displays a message indicating that you need to cancel the generated membership order(s) if the customer does not want to receive shipments.
  - If the membership generation is currently in process, or if the customer membership is in **In process** status because the generated order is suspended in batch, the system displays a message indicating that you need to cancel the customer membership through the **Work with Customer Memberships (WWCM)** menu option.
  - If the order is eligible, generates an order or order line cancellation email or the Outbound Email XML Message (CWEmailOut) to the customer; see *Cancellation Email*.
- Returns you to the previous page, and displays a message indicating the order line has been canceled.

5. Unlock the order when you are done. The system does not automatically unlock the order.

> **Note:**
>
> If you use price table pricing, canceling an item may affect pricing and premium items.

Item Cancellation Updates

The effect of canceling an item depends on whether you reduce demand.

You reduce demand if you use a cancel reason code with the **Reduce Demand** field selected. One reason to reduce demand is if the quantity ordered was keyed incorrectly (10 units instead of 1).

- **If you reduce demand:** The line status is closed and the quantity ordered is reduced to zero.
- **If you do not reduce demand:** The line status is canceled, the quantity ordered is not affected, and the canceled quantity is increased by the entire quantity ordered.

In addition, the system looks at the setting of the *Recalculate Freight Default (F62)* system control value.

- If the *Recalculate Freight Default (F62)* system control value is selected, the system recalculates the shipping charges on the order and refunds the shipping amount for the canceled item.
- If the *Recalculate Freight Default (F62)* system control value is unselected, the system does not recalculate or refund shipping charges.

> **Note:**
>
> Regardless of the setting of the *Recalculate Freight Default (F62)* system control value, the system recalculates the tax amount on the order.

Fields on Cancel Order Line

Purpose: The following information displays on the **Cancel Order Line** window.

- **Brokered Warning Message**: The system displays a message at the top of the window if the order line contains an item brokered to Order Orchestration for fulfillment. If you cancel the item, the system sends the cancellation to Order Orchestration; see *Order Orchestration and Item Cancellation* for more information.
- *Item Description* (unlabeled field below the **Cancel Order Line** window title)
- *Item ID* (unlabeled field to the right of the **Item Description**)
- *SKU Description* (unlabeled field below the **Item Description**)
- *Membership Program*: The **Membership Program** field displays only if multiple membership programs are included on the order and the system cannot determine which membership program to cancel.
- *Quantity to Cancel*: The quantity that will be canceled when you submit the cancellation. Display-only.
- *Cancel Reason*

For more information:

- *Cancel Order Line* for an overview of the **Cancel Order Line** window.
- *Cancel Order Line Options* for step-by-step instructions on the actions you can perform on the **Cancel Order Line** window.

39 Discount Order Line

Purpose: Use the **Discount Order Line** window to apply a discount dollar amount or a discount percentage to a shipped item. You can also select to price the item at no charge.

How to display: In the *Order Lines Panel* on the *Order Summary* page, select the **Discount** option from the actions menu (⋮) for a closed (shipped), unreturned order line.

> **Note:**
>
> - The **Discount** option is available only for unreturned order lines in a closed status if the order is not locked by a user and you have authority to discount an order line.
> - The **Discount** option is not available for ship-for-pickup orders if the *Payment at POS for Ship for Pickup Orders (L60)* system control value is selected.
> - For set items, the **Discount** option displays for the main set item and not the set component items.
> - To ensure the background async jobs update order related tables correctly, do not use this option against a shipped, unreturned order line in the same session that you add a new order line.

In this topic:

For more information:

- *Discount Order Line Options* for step-by-step instructions on the actions you can perform on the **Discount Order Line** window.
- *Fields on Discount Order Line* for a description of the fields on the **Discount Order Line** window.

Price Override Limit Percent

Purpose: The *Price Override Limit Percent (E55)* system control value defines the percentage of the price override limit you can enter for items. The system uses the price defined in the item/offer to determine whether the price override exceeds the percentage. The override limit applies only to prices that are lower than the item/offer price.

If you do not have authority to the *Override Price Override Limit (A64)* secured feature, and:

- The price override exceeds the *Price Override Limit Percent (E55)*, the system displays an error message if the entered price is less than the percentage allowed. The system processes the order line if an operator enters a price that is greater than the percentage allowed and writes a **W** order transaction history record for the price override.
- The price override does not exceed the *Price Override Limit Percent (E55)*, the system processes the order line if an operator enters a price that does not exceed the percentage.

If you have authority to the *Override Price Override Limit (A64)* secured feature, and:

- The price override exceeds the *Price Override Limit Percent (E55)*, the system processes the order line and writes a **W** order transaction history record for the price override. The **W** transaction history record shows you the line on the order where a price override occurred, the price override amount and the user ID of the person who performed the price override.
- The price override does not exceed the *Price Override Limit Percent (E55)*, the system processes the order line.

Price Override Example

The system uses this calculation to determine the percentage of the price override:

```
(offer price - price override entered) / offer price * 100 = price
override percentage
price override percentage = 10%
offer price = $40.00
price override = $35.00
(40.00 - 35.00) = 5.00
5.00/40.00 = .125
.125 * 100 = 12.50 (12.50 exceeds the 10% price override)
```

Display Order Line Discount Message (F01)

If the *Display Order Line Discount Message (F01)* system control value is selected and the offer price is greater than the unit price, the system displays the offer price with a strikethrough before the *Unit Price* for an item on the *Order Summary* page and *Order Line Details* page, allowing you to be able to tell when a discount has been applied to the item. If system control value F01 = N, then just the unit price would show.

What Qualifies as a Discount?

Any price that is less than the single-unit offer price for the item is considered a discounted price. For example:

- manual price overrides
- quantity break by item
- special pricing by source code
- associate pricing
- price table pricing

If you use tax-inclusive pricing, the system compares the actual price with the tax-inclusive offer price to determine if the item is discounted.

The system does not display an offer price with a strikethrough when you override the price on the order line, and:

- No item/SKU offer price exists, or
- The price override reason code's **Override item offer price** is selected.

You can review how the price was calculated for the item and other information related to the order line on the *Order Line Details* page.

Discount Order Line Options

Purpose: You can perform the following actions on the Discount Order Line window.

For more information:

- *Discount Order Line* for an overview of the **Discount Order Line** window.
- *Fields on Discount Order Line* for a description of the fields on the **Discount Order Line** window.

Discount an Order Line

1. Select a price discount method from the *Price Discount Method* drop-down box. Valid values are **Discount Price**, **Discount% Off Price**, and **No Charge**.
2. Define the discount:
   - If you selected **Discount Price**, enter the *Discount Price* you wish to apply to the order line and define a *Price Override Reason*. The current price of the item defaults allowing you to override it to a lower price.
   - If you selected **Discount% Off Price**, enter the *Discount% Off Price* percentage you wish to apply to the order line and define a *Price Override Reason*.
   - If you selected **No Charge**, define a *Price Override Reason*.
3. Select **Update Order Line**. The system validates your entries. An error message displays if:
   - You do not select a price override reason from the *Price Override Reason* field.
   - The price in the **Discount Price** field is greater than the original price on the order line.
   - The price in the **Discount Price** field is less than the percentage discount allowed by the *Price Override Limit Percent (E55)* system control value and you do not have authority to the *Override Price Override Limit (A64)* secured feature.
   - The discount percentage entered in the **Discount% Off Price** field is greater than the percentage defined in the *Price Override Limit Percent (E55)* system control value and you do not have authority to the *Override Price Override Limit (A64)* secured feature.
4. If the update is successful, the system:
   - Returns you to the previous page and displays a message indicating the order line was updated.
   - If you entered a **Discount Price**, updates the *Unit Price* of the order line to this price.

- If you entered a **Discount % Off Price**, applies the discount percentage to the dollar amount in the *Unit Price* field.
- If you selected **No Charge**, updates the *Unit Price* to zero.
- If the discount resulted in a reduction in freight charges, updates the order with the reduced freight amount and includes the reduction when processing the credit invoice for the discount. For example, the freight total might be reduced if the freight calculation is based on the merchandise total, which has now decreased below a specified level.
- Reduces the tax amount on the order based on the discount amount.
- Creates an order transaction history message indicating the item has been discounted.
- To the left of the unit price, is the offer price with a strikethrough. The offer price with strikethrough only appears if the offer price is greater than the unit price and *Display Order Line Discount Message (F01)* is selected for an item on the *Order Summary* page and *Order Line Details* page. If F01 is not selected or the offer price is less than unit price, then only the unit price is shown. When F01 is selected and an offer price with strikethrough is shown, this is meant to represent the customer received a discount on this item.
- Generates a refund for the discounted amount plus any reduction in freight or tax.

Fields on Discount Order Line

Purpose: The following information displays on the **Discount Order Line** window.

- *Item Description* (unlabeled field below the **Discount Order Line** title)
- *Item ID* (unlabeled field to the right of the **Item Description)**
- *SKU Description* (unlabeled field below the **Item Description** and **Item ID**)
- *Price Discount Method*
- **Price** (*Discount Price*): This field initially displays the current *Unit Price* of the order line. You can decrease the price from the original order line price. This field displays only if the **Price Discount Method** is **Discount Price**.
- *Discount% Off Price*: This field displays only if the **Price Discount Method** is **Discount% Off Price**.
- *Price Override Reason*

For more information:

- *Discount Order Line* for an overview of the **Discount Order Line** window.
- *Discount Order Line Options* for step-by-step instructions on the actions you can perform on the **Discount Order Line** window.

40
Inventory Information

Purpose: Use the **Inventory Information** window to review on hand quantities in each warehouse assigned to an item.

How to display:

- In the *Order Lines Panel* of the *Order Entry* or *Order Summary* pages, select the **Check Item Availability** option for an item that is not eligible for the merchandise locator.
- Select the **Check Item Availability** option on the *Customer Items List* page for an item that is not eligible for the merchandise locator.

> **Note:**
>
> For set items, the **Check Item Availability** option is available for the set component item and not the main set item.

See *Inventory Information (Merchandise Locator)* for information on checking item availability for items that are eligible for the merchandise locator.

Item Warehouse records first display on this window in descending available quantity sequence.

For more information:

- *Inventory Information Options* for step-by-step instructions on the actions you can perform on the **Item Availability** window.
- *Fields on Inventory Information* for a description of the fields on the **Inventory Information** window.

Inventory Information Options

Purpose: You can perform the following actions on the **Inventory Information** window.

- *Sort Inventory Information Records*

For more information:

- *Inventory Information* for an overview of the **Inventory Information** window.
- *Fields on Inventory Information* for a description of the fields on the **Inventory Information** window.

Sort Inventory Information Records

You can sort on any column in the **Inventory Information** table by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Item availability records first display on this window in descending available quantity sequence.

Fields on Inventory Information

Purpose: The following information displays on the **Inventory Information** window.

- *Item Description* (unlabeled field below the window title)
- *Item ID* (unlabeled field to the right of the **Item Description** field)
- *SKU Description* (unlabeled field below the **Item ID** and **Item Description**)
- **Total Available**: The quantity of the item available across all item warehouses.

Inventory Information Table

The **Inventory Information** table displays inventory information in each warehouse assigned to the item that is viewable in order entry (the **Viewable in O/E** field for the warehouse is selected).

Inventory information records initially display in ascending available quantity sequence.

For each item warehouse, the table displays the following fields:

- *Warehouse*
- **Available** (*Warehouse Available*)
- **Backordered** (*Warehouse Backordered*)
- **Open Purchase Orders** (*Warehouse Open Purchase Orders*)

For more information:

- *Inventory Information* for an overview of the **Inventory Information** window.
- *Inventory Information Options* for step-by-step instructions on the actions you can perform on the **Inventory Information** window.

41 Inventory Information (Merchandise Locator)

Purpose: Use the **Inventory Information (Merchandise Locator)** window to review an item's availability in external locations and the details about the external location.

How to display:

- In the *Order Lines Panel* of the *Order Entry* or *Order Summary* pages, select the **Check Item Availability** option for an item whose **OROB Eligible** field is selected.
- Select the **Check Item Availability** option on the *Customer Items List* page for an item that is not eligible for the merchandise locator.

> **Note:**
>
> - The **Inventory Information (Merchandise Locator)** window is available only if the *Use Merchandise Locator (I38)* system control value is selected.
> - For set items, the **Check Item Availability** option is available for the set component item and not the main set item.
> - In *Order Summary* and *Customer Items List* pages, the **Check Item Availability** option is available only for order lines whose status is **Open**, **Held**, **Soldout**, **Suspended**, or **Express Bill**. It is not available for orders in **Error** status.

Locations first display on this window in closest proximity sequence.

> **Note:**
>
> - There may be a slight delay while the window loads the item availability search results.
> - The message `No data to display` may display if there are no locations that meet the search criteria or if communication with Order Orchestration is not available.

See *Inventory Information* for information on checking inventory information for items that are not eligible for the merchandise locator.

- *Merchandise Locator API*
  - *Searching for Pickup Locations and Shipment Availability*
  - *How does Order Orchestration Select the Locations to Include?*
  - *Merchandise Locator for Different Types of Items*

– *Merchandise Locator Troubleshooting*

For more information:

- *Inventory Information (Merchandise Locator) Options* for step-by-step instructions on the actions you can perform on the **Inventory Information (Merchandise Locator)** window.
- *Fields on Inventory Information (Merchandise Locator)* for a description of the fields on the **Inventory Information (Merchandise Locator)** window.

Merchandise Locator API

Purpose: The merchandise locator integration requests current availability information about an item/SKU in retail stores within a geographic search area or in external warehouses.

The merchandise locator search finds locations where the item is available for pickup, as well as indicating whether the item is available for shipment from a location. Your search specifies the requested quantity, and Order Administration uses the ProductAvailability request and response to communicate with Order Orchestration.

Searching for Pickup Locations and Shipment Availability

A typical process of inquiring on locations where an item is available for pickup, as well as whether the item is available for shipment from a location, is described below.

1. A customer wants to know if an item/SKU is available for pickup at a nearby store or available for shipment from a store location. You select the **Item Availability** option for the item on the *Order Summary* page.
2. The system uses the customer's geographic location, a default item quantity, and a default radius to search within to search for locations.
3. In the background, the MERCH_LOC process:
   - Generates the ProductAvailability request message and sends it to Order Orchestration. Order Orchestration checks the availability of the item in stores that stock the item/SKU within the search area, as well as whether the item is available for shipment at any store locations within the same search area.
   - Receives the ProductAvailability response returned by Order Orchestration. This message lists:
     – The item/SKU's current or estimated availability in each searched location that stocks the item for pickup.
     – An indicator of whether the requested quantity of the item/SKU is available for shipment within the search area.
4. You advance to the **Inventory Information** window, displaying the item/SKU's availability for pickup in each of the locations, including information on any open purchase orders. The window also indicates whether the requested quantity of the item/SKU is available for delivery from a store within the same search area.

Important: The Order Broker supports merchandise locator searches only within the U.S. and Canada.

How does Order Orchestration Select the Locations to Include?

Locations Eligible to Fulfill Pickup Orders

- Only store locations flagged as **Pickup available** can be included in the search results displayed at the Item Availability window.
- Order Orchestration uses any probability rules you have set up to determine whether to include locations in the results, and the available quantity to indicate. For example, you might set up a probability rule for certain locations indicating to exclude them if the available quantity falls below 5 units, or to reduce the available quantity returned in the response message by 10%.

Results Displayed: For each location included in the search results as eligible for a pickup order, the **Item Availability** window indicates:

- The available quantity, next purchase order date, and next purchase order quantity.
- Whether the store location will ship the item for pickup in another store location.
- The name, address, and phone number of the location.
- The distance from the search address:
  - Locations are sorted in ascending order by distance (closest location listed first).
  - Locations that are not flagged to **Use Proximity Locator** are listed without a distance.

> **Note:**
>
> - If a location that stocks the item and is within the search radius is flagged in Order Orchestration as **Backorder Available**, it is returned in the search results even if it does not have the item available. In this case, the available quantity listed can be blank, or can be a negative quantity.
> - If there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as **Backorder Available**), the **Item Availability** window displays the locations, but does not indicate the distance, available quantity, open purchase order quantity, or next purchase order date. This situation could occur if, for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower search quantity.

Locations Eligible to Fulfill Delivery Orders

Only store locations flagged as **Shipping available** are eligible to fulfill a delivery order. Also, Order Orchestration:

- Uses any probability rules you have set up to determine whether to include locations in the results, and the available quantity. For example, you might set up a probability rule for certain locations indicating to exclude them if the available quantity falls below 5 units, or to reduce the available quantity indicated in the response message by 10%.
- Does not exclude locations flagged as **Backorder available**, even if the available quantity in the location is less than the requested quantity.
- Restricts eligible locations to a fulfillment zone based on the search address, if configured in Order Orchestration.

- Excludes locations associated with the Order Administration's system in Order Orchestration, if the **Disallow shopping within same system** option is selected for the Order Administration system in Order Orchestration.
- Excludes locations that have already been assigned the **Maximum Daily Orders**, if **Use Maximum Order Limits** preference is selected in Order Orchestration.

Results Displayed: If the results indicate that one or more locations could deliver the requested quantity, the **Item Availability** window indicates `Delivery From Store Is Available`; otherwise, the window indicates `Delivery From Store Is Not Available`.

> **Note:**
>
> The delivery evaluation uses the same search radius as the pickup evaluation. To determine whether the item can be shipped without restricting the results to locations within driving distance of the customer, retry the search with a higher search radius.

Merchandise Locator for Different Types of Items

Merchandise locator searches are not useful for the following types of items:

- membership item
- subscription item
- component of a set (although you can include the main set item)

Also, an item must have its **OROB eligible** flag selected in order to be eligible for a merchandise locator search. Typically, you would use this flag to exclude inappropriate items, such as gift cards or any other items that are not available in external store locations.

> **Note:**
>
> The restriction against set components applies only if the item is added to the order as a component of a set. If you enter the item as a separate order line, merchandise locator searching is still available.

Merchandise Locator Troubleshooting

Problem: A location that stocks the requested item is not listed at the **Inventory Information** window.

Possible Explanation or Solution: The location might:

- Not have the **Pickup available** flag selected in Order Orchestration.
- Be excluded because of probability rules.
- Be outside of the search radius.

Problem: Availability information is not available.

Possible Explanation or Solution: Could occur because:

- Communication to Order Orchestration is not active.
- Order Orchestration could not identify the search location based on the information sent in the search request (for example, it has no record of the provided zip code).
- None of the locations within the search area have the item/SKU in stock. You can select the **Edit Search Criteria** option to change the search location or distance to search within.
- None of the locations within the search area stock the item/SKU. You can select the **Edit Search Criteria** option to change the search location or distance to search within.
- The customer address information provided in the merchandise locator request was invalid or incomplete. This could occur if, for example, you entered a Canadian address, but the database used to identify customer locations in Order Orchestration includes only U.S. addresses.

Problem: The item is invalid.

Possible Explanation or Solution: The selected item is **OROB eligible**, but has not yet been created in Order Orchestration.

Problem: The **Item Availability** window does not indicate the distance, available quantity, purchase order quantity, or next purchase order date.

Possible Explanation or Solution: This situation can occur if there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as **Backorder Available**): for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower search quantity.

Problem: The **Item Availability** window lists a location with no quantity, or with a negative quantity.

Possible Explanation or Solution: This situation can occur if a location that stocks the item and is within the search radius is flagged in Order Orchestration as **Backorder Available**.

Product Availability Request Message

When you perform a merchandise locator availability search, the system sends a Product Availability Request message to Order Orchestration.

The system also uses this message when you search for a pickup or ship-for-pickup location in Contact Center order entry; see *Search for and Select a Pickup Location* for background.

The information in the Product Availability Request message includes:

- **version**: from CW_LOCATE_MESSAGE_VERSION in the **Work with Customer Properties (PROP)** menu option.
- **destination**: from the *OROB Account (K49)* system control value.
- **requesting location code**: from the *OROB Default Location (K51)* system control value.
- **requesting system code**: from the *OROB System (K50)* system control value.
- **type**: the request includes a **fulfillment_type** with a **type** of `SHIPFORPICKUP`, indicating the Product Availability Response should return a list of locations where the customer could pick up the item for the requested quantity.

> **Note:**
>
> When you *Search for and Select a Pickup Location* in Contact Center order entry, a type of `PICKUP` is passed if the *Store Pickup Order Type (L33)* system control value is populated. A type of `SHIPFORPICKUP` is also passed if at least one Store Cross Reference record, set up through the Work with Store Cross Reference (WSCR) menu option, is flagged as **Ship for Pickup**.

- **range_distance**: the setting in the *Default Search Within Radius (I40)* system control value, unless you changed the radius using the **Edit Item Availability Search Criteria** window or at the *Select Shipping Option and Enter Other Order Information* step in Contact Center order entry.
- **range_unit**: from the *Merchandise Locator Distance Measurement (I39)* system control value.
- **item ID**: always indicates the Order Administration item and SKU code, regardless of the setting of the *OROB Product Code ID (K66)* system control value.
- **qty**: The requested quantity of the item. For a merchandise locator search, defaults to **1** unless you changed the quantity using the **Edit Item Availability Search Criteria** window. When you *Search for and Select a Pickup Location* in Contact Center order entry, this is the order line quantity.
- **address information**: the sold-to customers address information, unless you changed the address using the **Edit Item Availability Search Criteria** window for a merchandise locator search, or when you *Search for and Select a Pickup Location* in Contact Center order entry.

Product Availability Response Message

The information in the Product Availability Response message includes:

- **version**: the version specified in the request message.
- **response_cd**: set to `0` if the requested quantity of the item is available for pickup within the search radius; otherwise, set to `1011`.
- **response_description**: set to `Success` if the requested quantity of the item is available for pickup within the search radius; otherwise, set to `Product not available` within search criteria
- **item ID**: the item and SKU specified in the request message.
- **location_cd**: the code identifying the location, as set up in Order Orchestration.
- **system_cd**: the code identifying the location's system, as set up in Order Orchestration.
- **distance**: the total miles or kilometers (depending on the setting of the *Merchandise Locator Distance Measurement (I39)* system control value) between the search address and the address of the location.
- **distance_unit**: set to `M` if the distance unit specified was miles; otherwise, set to `K`.
- **location**: for each location included in the response, the name and address is included.

Inventory Information (Merchandise Locator) Options

Purpose: You can perform the following actions on the **Inventory Information (Merchandise Locator)** window.

- *Sort Inventory Information Records*
- *Edit Search Criteria*

For more information:

- *Inventory Information (Merchandise Locator)* for an overview of the **Inventory Information (Merchandise Locator)** window.
- *Fields on Inventory Information (Merchandise Locator)* for a description of the fields on the **Inventory Information (Merchandise Locator)** window.

Sort Inventory Information Records

You can sort on any column in the **Inventory Information** table by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Item availability records first display on this window in descending available quantity sequence.

Edit Search Criteria

Select the **Edit Search Criteria** option to advance to the *Inventory Information (Edit Search Criteria)* window.

Fields on Inventory Information (Merchandise Locator)

Purpose: The following information displays on the **Inventory Information (Merchandise Locator)** window.

- *Item Description* (unlabeled field below the window title)
- *Item ID* (unlabeled field to the right of the **Item Description** field)
- *SKU Description* (unlabeled field below the **Item ID** and **Item Description**)
- **Total Available:** The total quantity available within the search criteria. This screen does not include Order Administartion warehouse locations, only store locations within the proximity specified.
- **Delivery Availability** (unlabeled field below the **SKU Description**): If the results indicate that one or more locations could deliver the requested quantity, the **Inventory Information** window indicates `Delivery From Store Is Available`; otherwise, the window indicates `Delivery From Store Is Not Available`.
- **Search Address**: The address information used to search for item availability in external locations. The sold-to customer's address defaults, unless you changed the address information using the *Inventory Information (Edit Search Criteria)* window.
- *Search Radius*: The setting of the *Merchandise Locator Distance Measurement (I39)* (miles or kilometers) is to the right. The search radius defaults from the *Default Search*

Within Radius (I40) system control value, unless you changed the radius using the *Inventory Information (Edit Search Criteria)* window.

- **Item Quantity**: The requested quantity of the item. Defaults to **1** unless you changed the quantity using the *Inventory Information (Edit Search Criteria)* window.

Inventory Information Table

The **Inventory Information** table displays inventory information for each location in the search results where the customer could pick up the item.

Locations are sorted initially by distance (nearest to farthest away).

> **Note:**
>
> The message `No data to display` may display if there are no locations that meet the search criteria or if communication with Order Orchestration is not available.

For each location, the table displays the following fields:

- *Location*
- **Ship-for-Pickup**: Indicates whether the store location is available for selection as a destination for a ship-for-pickup order. This is from the **Ship for Pickup** setting for the store location in the **Work with Store Cross Reference (WSCR)** menu option.
  - `Ship-for-Pickup Is Available` displays if the store location is available for selection as a destination for a ship-for-pickup order (the **Ship for Pickup** setting is selected for the location in the **Work with Store Cross Reference (WSCR)** menu option).
  - `Ship-for-Pickup Is Not Available` displays if the store location is not available for selection as a destination for a ship-for-pickup order (the **Ship for Pickup** setting is unselected for the location in the **Work with Store Cross Reference (WSCR)** menu option.
- *Distance*: The distance displayed is `0` if the location is not set up in Order Orchestration to use proximity rules. In this situation, the location is always considered to be within the specified search radius.
- **Available** (*Location Available Quantity*)
- **Purchase Orders:** *Location Open Purchase Orders* and *Location Next PO Date*

For more information:

- *Inventory Information (Merchandise Locator)* for an overview of the **Inventory Information (Merchandise Locator)** window.
- *Inventory Information (Merchandise Locator) Options* for step-by-step instructions on the actions you can perform on the **Inventory Information (Merchandise Locator)** window.

42 Inventory Information (Edit Search Criteria)

Purpose: Use the **Inventory Information (Edit Search Criteria)** window to update the search criteria used to check availability for an item across external locations, such as retail stores, typically through Order Orchestration.

How to display: Select the **Edit Search Criteria** option on the *Inventory Information (Merchandise Locator)* window.

> **Note:**
>
> The **Inventory Information (Merchandise Locator)** window is available only if the *Use Merchandise Locator (I38)* system control value is selected.

For more information:

- *Edit Inventory Information Search Criteria Options* for step-by-step instructions on the actions you can perform on the **Edit Inventory Information Search Criteria** window.
- *Fields on Inventory Information (Edit Search Criteria)* for a description of the fields on the **Edit Inventory Information Search Criteria** window.
- *Inventory Information (Merchandise Locator)* for an overview of the *Merchandise Locator API*.

Edit Inventory Information Search Criteria Options

Purpose: You can perform the following actions on the **Inventory Information (Edit Search Criteria)** window.

- *Update Search Criteria*

For more information:

- *Inventory Information (Edit Search Criteria)* for an overview of the **Inventory Information (Edit Search Criteria)** window.
- *Fields on Inventory Information (Edit Search Criteria)* for a description of the fields on the **Inventory Information (Edit Search Criteria)** window.

Update Search Criteria

When you first advance to the **Inventory Information (Edit Search Criteria)** window, the information that you last used to perform a search defaults; this is typically the sold-to customer's address information. Use the following steps to update the search criteria used to search for an item's availability in external locations.

1. Select a *Country* **Code**. **Note:** The Order Broker supports merchandise locator searches only in the U.S. and Canada.

2. Optionally, enter a *Street Address*. This is the address that serves as the central point for the search radius.
3. Enter either a *Postal Code* or *City* and *State/Province* **Code**. For example, if the **Search Radius** is set to 25 miles, the search includes locations within 25 miles of the postal code or city and state/province that you enter.
4. Enter a *Search Radius*. This is the miles or kilometers to search within for the selected item. The search radius defaults from the *Default Search Within Radius (I40)* system control value, but you can override it.
   - The search radius applies only to locations that use proximity rules. You might set up Order Orchestration so that proximity rules apply to stores only and not warehouses.
   - The distance unit of measure (miles or kilometers) specified with the *Merchandise Locator Distance Measurement (I39)* system control value is displayed to the right.
   - Typically, a search for a delivery location can use a broader search radius than a search for a pickup location, which is generally within driving distance. To see if the item is available for delivery as opposed to pickup, you might search twice, specifying a different search radius when determining if the item is available for delivery.
5. Enter a requested **Item Quantity**. The default quantity is **1**, but you can override.
6. Select the **Update Search Criteria** option to submit the search. In the background, the MERCH_LOC process:
   - Generates the ProductAvailability request message and sends it to Order Orchestration. Order Orchestration checks the availability of the item in stores that stock the item/SKU within the search area, as well as whether the item is available for shipment at any store locations within the same search area.
   - Receives the ProductAvailability response returned by Order Orchestration. This message lists:
     – The item/SKU's current or estimated availability in each searched location that stocks the item for pickup.
     – An indicator of whether the requested quantity of the item/SKU is available for shipment within the search area.
7. When the system receives the response message, you advance to the *Inventory Information (Merchandise Locator)* window, displaying the item/SKU's availability for pickup in each of the locations, including information on any open purchase orders. The screen also indicates whether the requested quantity of the item/SKU is available for delivery from a store within the same search area.

Fields on Inventory Information (Edit Search Criteria)

Purpose: The following information displays on the **Inventory Information (Edit Search Criteria)** window.

- *Country* **Code**
- *Street Address*
- *City*
- *State/Province* **Code**

- *Postal Code*
- *Search Radius*: The setting of the *Merchandise Locator Distance Measurement (I39)* (miles or kilometers) is to the right.
- **Item Quantity**: The requested quantity of the item.

For more information:

- *Inventory Information (Edit Search Criteria)* for an overview of the **Inventory Information (Edit Search Criteria)** window.
- *Edit Inventory Information Search Criteria Options* for step-by-step instructions on the actions you can perform on the **Inventory Information (Edit Search Criteria)** window.

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Order Line Activity

Purpose: Use the **Order Line Activity** window to review the updates performed against an item detail line since the item was entered on the order.

The system logs all item activity automatically for inquiry purposes, including order line activity received through the Order Line History In API, and displays this information on the **Order Line Activity** window.

How to display: In the *Order Lines Panel* of the *Order Summary* page, select the **Order Line Activity** option for an order line.

For more information:

- *Order Line Activity Options* for step-by-step instructions on the actions you can perform on the **Order Line Activity** window.
- *Fields on Order Line Activity* for a description of the fields on the **Order Line Activity** window.

Order Line Activity Options

Purpose: You can sort order line activity on the **Order Line Activity** window.

For more information:

- *Order Line Activity* for an overview of the **Order Line Activity** window.
- *Fields on Order Line Activity* for a description of the fields on the **Order Line Activity** window.

Sort the Order Line Activity

You can sort on any column in the **Order Line Activity** table by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Order line activity first displays on this page in descending activity date and time sequence.

Fields on Order Line Activity

Purpose: The following information displays on the **Order Line Activity** window.

- *Item Description* (unlabeled field below the **Order Line Activity** title)
- *Item ID* (unlabeled field to the right of the **Item Description**)
- *SKU Description* (unlabeled field below the **Item Description**)

Order Line Activity Table

The **Order Line Activity** table tracks the updates performed against an item detail line.

Order line activities display in descending activity date and time sequence.

For each activity, the table displays the following fields:

- **Activity** (*Order Line Activity*)
- **Date** (*Order Line Activity Date*)
- **Quantity** (*Order Line Activity Quantity*)
- **Reason** (*Order Line Activity Reason*)
- **User** (*Order Line Activity User*)

For more information:

- *Order Line Activity* for an overview of the **Order Line Activity** window.
- *Order Line Activity Options* for step-by-step instructions on the actions you can perform on the **Order Line Activity** window.

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Order Line Details

Purpose: Use the **Order Line Details** page to review the details of an item on an order line, including:

- The offer and source code assigned to the order line.
- Whether the item is gift wrapped.
- Entered, arrival, cancel, reserved, printed, and expected ship dates.
- The ship via assigned to the item.
- The warehouse assigned to the item.
- The quantity of the item reserved, printed, shipped, returned, canceled, soldout, and confirmed.
- Pricing information.
- Order line totals.
- Order line activity.
- Item availability information.
- Gift card information if the item is a gift card.
- Order line messages.
- Item/SKU comments.

How to display: In the *Order Lines Panel* of the *Order Summary* page, select the **Order Line Details** option from the actions menu (⋮) for an order line.

For more information:

- *Order Line Details Options* for step-by-step instructions on the actions you can perform on the **Order Line Details** page.
- *Fields on Order Line Details* for a description of the fields on the **Order Line Details** page.

Order Line Details Options

Purpose: In addition to reviewing order line details, you can perform the following actions on the **Order Line Details** page.

Order Line Actions:

- *Review, Change, or Delete Personalization Details*
- *Sort Order Line Activity Records*
- *Sort Inventory Information Records*
- *Sort Gift Card Details*
- *Filter Gift Card Detail Records*

- *Add an Order Line Message*
- *Update an Order Line Message*
- *Delete an Order Line Message*
- *Sort Order Line Messages*
- *Filter Order Line Messages*
- *Sort Item/SKU Comments*
- *Filter Item/SKU Comments*

Order Actions:

- *Review or Work with Order Messages or Order Notes*
- *Review Order Summary*
- *Review Order Activity*
- *Review Refunds and Returns for the Order*
- *Review Invoices for the Order*
- *Unlock the Order*

For more information:

- *Order Line Details* for an overview of the **Order Line Details** page.
- *Fields on Order Line Details* for a description of the fields on the **Order Line Details** page.

Review, Change, or Delete Personalization Details

In the *Item Information Panel*, select the *Personalization (Special Handling)* link for an item to advance to the *Personalization Information* window.

> **Note:**
>
> The **Personalization** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Sort Order Line Activity Records

You can sort on any column in the *Order Line Activity Table* by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Order line activity records first displays in this table in descending activity date, ascending activity type sequence.

Sort Inventory Information Records

You can sort on any column in the *Inventory Information Table* by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Item Warehouse records first display in this table in descending quantity available sequence.

Sort Gift Card Details

You can sort on any column in the *Gift Card Details Table* by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Gift cards first display in this table in ascending gift card number sequence.

Based on the user's authority under the *Display Full Gift Card Number (B26)* secured feature, only the last four digits of the number may be displayed.

Filter Gift Card Detail Records

The *Order Line Details* page displays the first 15 gift card details for the order line.

The page provides an entry field below the **Gift Card Details** panel with the message **Filter results**. You can further refine the gift card details displayed in the *Gift Card Details Table* by entering one or more search terms found in any of the fields displayed in that table.

Example: Enter `500`. The displayed gift card details include only those that include 500 in the amount or the last 4 positions of the gift card number. Next, enter a date of 1/28. Displayed results are now further restricted to gift card details that include both search criteria.

Matching records need to contain the search term, but do not need to start with the search term. For example, both `123.45` and `23.45` are matches for a search term of `23`.

Filtering is across all results: The filtering is not restricted to the gift card details displayed on the first page of results. For example, if the gift card detail matching your entry is on the second page of results, this detail is displayed.

Additional information on filtering:

- Only fields displayed at the *Gift Card Details Table* are available for filtering.
- To filter based on issued date or email sent date, include the date delimiters. For example, enter 8/27 rather than 827 to filter for a message entered on August 27.

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.

Add an Order Line Message

Click **Add Order Line Message** above the *Order Line Messages Table* to open the *Order Line Message* window.

Update an Order Line Message

If you have authority under the *Modify Existing Messages (A30)* secured feature, you can edit a message in the *Order Line Messages Table*.

Optionally, select **Edit** from the actions menu (⋮) for the message to open the *Order Line Message* window, where you can edit any fields for the existing message.

Delete an Order Line Message

If you have authority under the *Modify Existing Messages (A30)* secured feature, you can delete a message in the *Order Line Messages Table*.

Optionally, select **Delete** from the actions menu (⋮) for the message. The message is deleted immediately.

Sort Order Line Messages

You can sort on any column in the *Order Line Messages Table* by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Order line messages first display in this table in descending message date sequence.

Filter Order Line Messages

The *Order Line Details* page displays the first 15 order line messages for the order line.

The page provides an entry field below the **Order Line Messages** panel with the message **Filter results**. You can further refine the order line messages displayed in the *Order Line Messages Table* by entering one or more search terms found in any of the fields displayed in that table.

Example: Enter `pick slip`. The displayed order line messages include only those that are flagged to print on the pick slip, or that include the words “pick slip” in the message. Next, enter a date of 1/28. Displayed results are now further restricted to order line messages that are both flagged to print on the pick slip and were entered on January 28.

Matching records need to contain the search term, but do not need to start with the search term. For example, both `123.45` and `23.45` are matches for a search term of `23`.

Filtering is across all results: The filtering is not restricted to the messages displayed on the first page of results. For example, if the only order line message matching your entry is on the second page of results, this message is displayed.

Additional information on filtering:

- Only fields displayed at the *Order Line Messages Table* are available for filtering.
- Filtering is not case-sensitive. For example, you can enter `pick` or `PICK` to display messages flagged to print on the pick slip.
- To filter based on entered date, include the date delimiters. For example, enter 8/27 rather than 827 to filter for a message entered on August 27.

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.

Sort Item/SKU Comments

You can sort on any column in the *Item/SKU Comments Panel* by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Item/SKU comments first display in this table in descending comment sequence. Any comments entered at the SKU level display for a SKU’d item; if there are no SKU-level comments, the item-level comments display.

Filter Item/SKU Comments

The *Order Line Details* page displays the first 15 item/SKU comments for the item on the order line. Only item/SKU comments that are flagged to display in a window are shown.

The page provides an entry field below the **Item/SKU Comments** panel with the message **Type to filter**. You can further refine the item/SKU comments displayed in the *Item/SKU Comments Panel* by entering one or more search terms found in the **Comment** field.

Filtering is across all results: The filtering is not restricted to the item/SKU comments displayed on the first page of results. For example, if the only item/SKU comment matching your entry is on the second page of results, this comment is displayed.

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.

Review or Work with Order Messages or Order Notes

Select **Messages** at the top of the page to advance to the Messages page for the current order.

Review Order Summary

Select **Order Summary** at the top of the page to advance to the *Order Summary* page for the current order.

Review Order Activity

Select **Order Activity** at the top of the page to advance to the *Order Activity* page for the current order.

Review Refunds and Returns for the Order

Select **Returns/Refunds** at the top of the page to advance to *Returns/Refunds* page.

Review Invoices for the Order

Select **Invoices** at the top of the page to advance to the *Invoices* page.

Unlock the Order

Select **Unlock Order** above the page or press CTRL + ALT + u to process any remaining order updates and unlock the order so that it available for maintenance by another user.

> **Note:**
>
> This option displays only if you have locked the order in the current session; it does not display if another user has locked the order. In this case, you can use the *Unlock Order* option if you have the required authority.

For more information: See *Maintaining an Order* for more information about locking and unlocking an order.

Fields on Order Line Details

Purpose: The following information displays on the **Order Line Details** page.

- *Order Line Details Page Title*
- *Item Panel*
  - *Item Information Panel*
  - *Item Availability Panel*
  - *At A Glance Panel*
  - *Item Quantities Panel*
  - *Item Pricing Panel*
  - *Order Line Totals Panel*
- *Order Line Activity Table*
- *Item Availability Table*
- *Gift Card Details Table*
- *Order Line Messages Table*
- *Item/SKU Comments Panel*

For more information:

- *Order Line Details* for an overview of the **Order Line Details** page.
- *Order Line Details Options* for step-by-step instructions on the actions you can perform on the **Order Line Details** page.

Order Line Details Page Title

The following fields display in the page title. For example: `Order 12345 | Ship-To 3 | Line 1`, where `12345` is the order number, `3` is the order ship to number, and `1` is the order line number.

- **Order** (*Order Number*)
- **Ship-To** (*Ship-To Number*)
- **Line** (*Order Line Number*)
- *Item Description*
- *Item ID*

Item Panel

The **Item** panel contains the following information:

- *Item Description* (unlabeled field below the page title)
- *Item ID* (unlabeled field to the right of the **Item Description**)
- *Item Information Panel*
- *Item Availability Panel*
- *At A Glance Panel*

- *Item Quantities Panel*
- *Item Pricing Panel*
- *Order Line Totals Panel*

Item Information Panel

The **Item Information** panel displays additional details about the item on the order line.

- *SKU Description*. Blank if the item does not have SKU's.
- *Main Set Item*: This field displays only if the item is a main set item.
- **Set**: The item description and item ID of the associated main set item displays; for example: `BATH SET (B123)`. This field displays only if the item is a set component item.
- *Personalization (Special Handling)*: Select this field to open the *Personalization Information* window. This field displays only if personalization is defined for the item on the order line, and only if the **Personalization** field is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Gift Wrap*: Set to No if gift wrap is not selected for the order line.
- *Offer*: The code and description are indicated.
- *Source*: The source code displays for an order line only if:
  - The order entry operator entered a source code at the line level.
  - The *Use Source Code from Order Header When Creating Order Lines (D73)* system control value is selected.
  - The *Load Source from Mailing History (D20)* system control value is selected and the offer entered on the detail line is not associated with the source code on the order header, and the system found an associated source code in the customer's mail history.
  - In addition, the **Source** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- **Date Entered** (*Entered Date*): The entered time displays to the right of the entered date.
- *Arrival Date*
- *Cancel Date*
- *Reserved Date*
- *Printed Date*
- *Expected Ship Date*
- *Ship Via*: Set to 0 if there is not a ship via override.
- *Coordinate Group*: Set to 0 if the item is not coordinate-grouped.

Item Availability Panel

The **Item Availability** panel displays additional reservation details about the item on the order line.

> **Note:**
>
> Item availability fields do not display for a main set item. Instead, a message indicates: `Item availability is not applicable for main set items.`

- *Drop Ship*. Set to No if the item is not flagged for drop shipment.
- *Warehouse*: This field is blank if the system determined which warehouse to use. In addition, the **Warehouse** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- **Next Backorder Date** (*Backorder Date*)
- *Backorder Reason*
- *Backorder Warehouse*: Set to 0 if the item is not backordered or if a warehouse does not apply because, for example, this is a drop ship item.
- *Backorder Priority*
- *Future Order*
- *Affect Inventory*
- *Bypass Reservation*

At A Glance Panel

The **At A Glance** panel displays links to other panels of the **Order Line Details** page :

- **Order Line Activity**: Select the **Order Line Activity** link to advance to the *Order Line Activity Table*.
- **Item Availability**: Select the **Item Availability** link to advance to the *Item Availability Table*. **Note:** The **Item Availability** link does not display for a main set item.
- **Gift Card Details**: Select the **Gift Card Details** link to advance to the *Gift Card Details Table*.
- **Order Line Messages**: Select the **Order Line Messages** link to advance to the *Order Line Messages Table*.
- **Item/SKU Comments**: Select the **Item/SKU Comments** link to advance to the *Item/SKU Comments Panel*.

Item Quantities Panel

The **Item Quantities** panel displays the various quantity information for the item.

> **Note:**
>
> Only the **Shipped** field is displayed for a main set item.

- **Reserved** (*Reserved Quantity*)
- **Printed** (*Printed Quantity*)

- **Shipped** (*Shipped Quantity*)
- **Returned** (*Returned Quantity*)
- **Canceled** (*Canceled Quantity*)
- **Sold Out** (*Sold-Out Quantity*)
- **Confirmed** (*Confirmed Quantity*)

Item Pricing Panel

The **Item Pricing** panel displays how the item was priced and any discounts and tax that were applied to the item.

- *Price Method*
- *Offer Price*
- Pre-Discount Price. This price is helpful when evaluating discounts applied by ORPE.
- *Customer Charged*
- *Price Override Reason*
- *Unit Price*:
  - To the left of the unit price, is the offer price with a strikethrough. The offer price with strikethrough only appears if the offer price is greater than the unit price and *Display Order Line Discount Message (F01)* system control valueis selected. If F01 is not selected or the offer price is less than unit price, then only the unit price is shown. When F01 is selected and an offer price with strikethrough is shown, this is meant to represent the customer received a discount on this item.
  - For set items, the unit price displays for the main set item and not the component items.

Order Line Totals Panel

The **Order Line Totals** panel displays the total price of the order line and other charges for the line.

- *Extended Price*: This field does not display for a set component item.
- **Personalization** (*Personalization (Special Handling) Charge*)
- **Gift Wrap** (*Gift Wrap Charge*): The **Gift Wrap** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Shipping*
- *Additional Shipping*
- *Duty*
- *Tax*. This total includes GST and PST, if any. This field does not include hidden tax.
- *GST*
- *PST*
- *Hidden Tax*

Order Line Activity Table

The **Order Line Activity** table displays the type of activity performed against the item on the order line. Order line activity records initially display in descending activity date, ascending activity type sequence.

For each order line activity record, the system displays the following fields.

- *Activity*
- **Date** (*Activity Date*)
- **Quantity** (*Activity Quantity*)
- **Reason** (*Activity Reason*)
- **User** (*Activity User*): A user ID does not display if you sell out an item through **Processing Auto Soldout Cancellations (MASO)** rather than order entry or order maintenance.

Inventory Information Table

The **Inventory Information** table displays inventory information by warehouse for the item on the order line.

> **Note:**
>
> The **Inventory Information** table does not display for a main set item.

- **Total Available**: The quantity of the item available to sell across all warehouses.

The system displays item warehouse records in descending quantity available sequence. For each item warehouse record, the system displays the following fields.

> **Note:**
>
> Warehouses whose **Viewable in O/E** field is unselected do not display in this table.

- *Location*: The location or *Warehouse* where the item is available.
- **Available** (*Warehouse Available*)
- **Backordered** (*Warehouse Backordered*)
- **Open Purchase Orders** (*Warehouse Open Purchase Orders*)

Gift Card Details Table

The **Gift Card Details** table displays the details for a gift card item that has been purchased on the order.

Gift cards initially display in ascending gift card number sequence. The system displays the following fields for each gift card purchased:

- *Gift Card Number*

- **Amount** (*Gift Card Amount*)
- **Issue Date** (*Gift Card Issue Date*)
- **Email Sent Date** (*Gift Card Notification Email*)
- **Activation Date** (*Gift Card Activation Date*)
- **Vendor Response** (*Gift Card Vendor Response*)

Order Line Messages Table

The **Order Line Messages** table displays the messages defined for an order line.

Order line messages first display in descending message date sequence.

For each message, the system displays the following fields.

- **Message** (*Order Line Message*)
- **Date** (*Order Line Message Date*)
- **Print Location** (*Order Line Message Print Location*)
- **User** (*Order Line Message User*)

Item/SKU Comments Panel

The **Item/SKU Comments** panel displays any comments for an item or SKU that have the **Print Code** set to **Window**. Any comments entered at the SKU level display for a SKU'd item; if there are no SKU-level comments, the item-level comments display.

Item/SKU comments first display in descending comment sequence.

- **Comment** (*Item/SKU Comment*)

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Personalization Information

Purpose: Use the **Personalization Information** window to review the personalization, or special handling, that has been defined for an item.

How to display from the Order Summary page: In the *Order Lines Panel* on the *Order Summary* page, select the **Personalization** link (for example, MO - MONOGRAM) for an order line if personalization has already been defined for the item. If no personalization has been defined for the item. If no personalization has been defined for the item, use the **Personalize** link on the upper right to open the *Add Personalization* window, provided the item is eligible for special handling.

From the Invoice page: In the *# Order Lines In This Invoice Panel* of the *Invoice* page, select the **Personalization** link for the item if personalization was defined for the item.

> **Note:**
>
> You cannot open this window if the item's personalization uses a **S/H Code** with the **Suppress S/H Window** flag set to **Suppress.**

How to display in Order Entry: Select **Personalize** for the item in the **Order Summary** panel. The **Personalization Information** window opens if personalization has already been defined for the item. If no personalization has been defined for the item, the *Add Personalization* window opens instead.

The **Personalize** option is also available at the *Review Order and Verify Order Information* step by clicking the additional charge code and description for the item.

If the **S/H Code** defined for the Item Offer or SKU Offer is set to an additional charge code whose **Suppress S/H Window** flag is set to **Suppress**, an error message displays if you select **Personalization** for the item.

In this topic:

- *Personalization Overview*
  - *Types of Personalization*
  - *Which Items Qualify for Personalization?*
  - *Personalization Cost*
  - *Personalization Restrictions*

For more information:

- *Personalization Information Options* for step-by-step instructions on the actions you can perform on the **Personalization Information** window.
- *Fields on Personalization Information* for a description of the fields on the **Personalization Information** window.

Personalization Overview

Purpose: Personalization, or special handling, is any type of item customization, such as monogramming, alterations, engraving, etc. You can also use a personalization code to automatically add a personalization charge to an order when the customer orders a specific item, even if there are no actual personalization instructions.

Types of Personalization

You can define standard or custom personalization for an item.

Personalization codes are defined in and validated against the Additional Charges table. In this table, you identify a code as a personalization code by entering **S** (standard format) or **C** (custom format) in the **Special Handling Type** field.

If the code calls for a custom format, you must enter a custom format code in the **Special Handling Format** field. Custom special handling formats are defined in and validated against the Special Handling Format table; you can create and work with custom special handling formats using the **Work with Custom Special Handling Formats (WSHF)** menu option.

When you set up a personalization code in the Additional Charges table, you also specify whether to advance to a personalization screen automatically, on-demand, or not at all in order entry when entering an item flagged for personalization in the item offer or SKU offer.

Standard Personalization

Standard personalization is a set of free-form instructions or notes about how to work on an item, including the charge for the personalization work. Standard personalization is entered in a free-format field where you can enter any information necessary to explain what needs to be done to the item.

Note that instructions entered in the Classic View of Order Administration are all upper case, while instructions entered in Contact Center can be upper and lower case. Also, instructions entered in the Classic View of Order Administration as separate lines are concatenated in Contact Center into a continuous line.

Custom Personalization

Custom personalization is a set of pre-formatted notes about how to work on an item, including charges for the custom special handling work. Custom personalization is entered on a page which includes the various fields that you need to complete to explain how to work on the item. Each activity is listed along with the valid responses. You can work with the customer to define exactly what needs to be done to the item, using this page as a guide to obtain complete and accurate information. For example, if the customer wants a shirt monogrammed, the custom personalization lets you enter the initials in a text field and select the thread color and monogram positioning from predefined lists.

The Special Handling Format table defines the contents of the custom personalization that displays in order entry. Custom personalization differs from standard personalization in that you can define required fields, offer additional features with a special charge, and specify valid values for input fields that the system will validate in order entry.

To use custom personalization, you must define the personalization format. You then associate the format with an additional charge code. You can then define that additional charge code for the Item/Offer or Item/SKU/Offer.

Which Items Qualify for Personalization?

The **Special handling** flag for the item offer or SKU offer controls whether the item is eligible for personalization. If the **Special handling** flag is selected:

- **Default personalization**: If there is a **Special handling code** specified for the item offer or SKU offer, and that code's **Bypass S/H** flag is unselected, then this type of personalization defaults for the item.
- **Optional personalization**: Otherwise, the item receives personalization only if you enter a code in the **S/H code** field for the item when you are entering the order, select the special handling option for an existing order detail line, or specify a special handling code in order maintenance.

If the **Special handling** flag for the item offer or SKU offer is unselected, the item is not eligible for personalization.

Personalization Cost

The system determines the personalization charge by:

- If a **Special Handling Price** is specified for the item offer or SKU offer, use this price; otherwise,
- If a **Default Price** or **Default Price%** is specified for the special handing format, use this price (this option is available for custom special handling only).

The personalization price is display-only in order entry.

Applying optional personalization in order entry: When an item supports personalization based on the **Special handling** flag for the item offer or SKU offer, but a default **Special handling code** is not specified, you can still apply special or custom personalization in order entry as well as order maintenance; however, you need to specify a default **Special Handling Price** for the item offer or SKU offer to add a charge to the order. Otherwise, the special handling price defaults to 0.00 and cannot be changed in order entry.

Personalization Restrictions

You can restrict the type of personalization an item can receive based on item class using the **Work with Item Classes (WICL)** menu option. For example, you might want to restrict personalizing a t-shirt with an emblem if the process used to attach the emblem damages the t-shirt.

If a special handling type is restricted for the item class, that type is not available for selection through the *Add Personalization* window.

You cannot edit personalization if the item's personalization uses a **S/H Code** with the **Suppress S/H Window** flag set to **Suppress.**

Personalization Information Options

Purpose: You can perform the following actions on the **Personalization Information** window.

- *Update Personalization Information*

- *Remove Personalization*

These options are available only if the order line is not closed.

> **Note:**
>
> You cannot open this window if the item's personalization uses a **S/H Code** with the **Suppress S/H Window** flag set to **Suppress.**

For more information:

- *Personalization Information* for an overview of the **Personalization Information** window.
- *Fields on Personalization Information* for a description of the fields on the **Personalization Information** window.

Update Personalization Information

Select the **Edit**option to advance to the *Edit Personalization Information* window. If you select this option from the *Order Summary* page, this locks the order.

The **Edit** option is available only if:

- You advanced to the **Personalization Information** window from the *Order Summary* page, or while in *Order Entry*,
- You have authority to edit order information,
- The order is not currently locked by another user, session, or by the system, and
- The order line status is open or held and the item does not have a printed or shipped quantity.

Remove Personalization

1. Select the **Remove** option to advance to a confirmation window.
2. At the confirmation window:
   - Select **Yes** to lock the order and remove the personalization from the item.
   - Select **No** to retain the item's personalization.
3. If you selected **Yes**, the system returns you to the previous page and displays a message indicating whether it was able to remove the personalization.

The **Remove** option is available only if:

- You advanced to the **Personalization Information** window from the *Order Summary* page, or while in *Order Entry*.
- You have authority to edit order information,
- The order is not currently locked by another user, session, or by the system, and
- The order line status is open or held, and the item does not have a printed or shipped quantity

Fields on Personalization Information

Purpose: The following information displays on the **Personalization Information** window.

- *Item Description* (unlabeled field below the **Personalization Information** title)
- *Item ID* (unlabeled field to the right of the **Item Description)**
- *SKU Description* (unlabeled field below the **Item Description** and **Item ID**.
- **Personalization** (*Personalization (Special Handling)*): This is the code and description of the personalization defined for the item, as defined for the additional charge code.
- **Personalization Charge** (*Personalization (Special Handling) Charge*)

Standard Personalization Fields

The following additional field displays when standard personalization has been defined for an item.

- **Personalization (**The name and code of the additional charge code used to apply standard personalization)
- **Personalization Charge** (*Personalization (Special Handling) Charge*)
- **Instructions** (*Personalization (Special Handling) Instructions*)

Custom Personalization Fields

The following fields display when custom personalization has been defined for an item, allowing you to help the customer define exactly how the item will be personalized. A custom label displays for each option that can be performed on the item, and optionally, the associated charge to apply the option to the item.

- *Personalization (Special Handling) Custom Label*: the name of the label is defined in the Special Handling Format table; you can create and work with custom special handling formats using the **Work with Special Handling Formats (WSHF)** menu option.
- *Personalization (Special Handling) Custom Response* (unlabeled field to the right of the **Personalization Custom Label**): This is the code and description of the selected custom special format response. The description displays only if the *Display Special Format Response Descriptions in Order Entry (E90)* system control value is selected.
- *Personalization (Special Handling) Custom Charge* (unlabeled field to the right of the **Personalization Custom Response**): A charge displays only if a charge is associated with the personalization response; otherwise, the charge displayed is 0.00.

For more information:

- *Personalization Information* for an overview of the **Personalization Information** window.
- *Personalization Information Options* for step-by-step instructions on the actions you can perform on the **Personalization Information** window.

46 Add Personalization

Purpose: Use the **Add Personalization** window to add customization to an item on an order.

How to display from the Order Summary page: In the *Order Lines Panel* on the *Order Summary* page, select the **Personalize** option for an order line. Also, if the item offer or SKU offer requires personalization based on the assignment of a **S/H Code**, the **Add Personalization** window opens automatically after you add the item to the order

The **Personalize** option is available only if:

- The item is eligible for personalization based on the **Special handling** setting for the Item Offer or SKU Offer, and is not an item class restriction against personalization for the item,
- The **S/H Code** defined for the Item Offer or SKU Offer is not set to an additional charge code whose **Suppress S/H Window** flag is set to **Suppress**; otherwise, an error message displays if you select **Personalize** for the item.
- There is not already personalization defined for the item on the order,
- You have authority to edit order information,
- The order is not currently locked by another user, session, or by the system, and
- The order line is open or held, and unprinted.

If there is already personalization defined for the item, the *Personalization Information* window opens instead. From that window, you can edit the existing personalization information, or delete the personalization.

How to display in Order Entry:

- The window opens automatically in *Order Entry* or from the *Order Summary* page when you add an item to the order if a **S/H Code** is defined for Item Offer or SKU Offer, provided the **S/H Code** does not have the **Bypass S/H** flag set to **Bypass** and the **Suppress S/H Window** flag is not set to **Suppress.**
- You can also open this window by selecting **Personalize** for the item in the **Order Summary** panel, or selecting the link below the item where it is listed at the **Review** step of order entry.

Edit personalization: To edit or update existing personalization information for an order line, Select the **Edit** option on the *Personalization Information* window, if it is available. See *Edit Personalization Information* for more information.

For more information:

- *Add Personalization Options* for step-by-step instructions on the actions you can perform on the **Add Personalization** window.
- *Fields on Add Personalization* for a description of the fields on the **Add Personalization** window.
- *Personalization Overview* for more information on personalization.

Add Personalization Options

Purpose: You can perform the following actions on the **Add Personalization** window.

- *Add Custom Personalization to an Item*
- *Add Standard Personalization to an Item*

For more information:

- *Add Personalization* for an overview of the **Add Personalization** window.
- *Fields on Add Personalization* for a description of the fields on the **Add Personalization** window.

Edit personalization: To edit or update existing personalization information for an order line, Select the **Edit** option on the *Personalization Information* window, if it is available. See *Edit Personalization Information* for more information.

Add Custom Personalization to an Item

1. Depending on whether a custom **S/H code** is defined for the Item Offer or SKU Offer associated with the offer on the order line:
   - **Custom personalization assigned to item?** If a custom **S/H code** is defined for the Item Offer or SKU Offer associated with the offer on the order line, the system defaults this personalization code to the **Personalization** field.
   - **Standard personalization assigned to item?** If a standard S/**H code** is defined for the Item Offer or SKU Offer associated with the offer on the order line, the system defaults this personalization code to the **Personalization** field. See *Add Standard Personalization to an Item* for the steps you use to add standard personalization.
   - **No personalization type assigned, but personalization supported?** If a **S/H code** is not defined for the Item Offer or SKU Offer associated with the offer on the order line, but the **Special handling** setting for the Item Offer or SKU Offer is selected, you can select a personalization code from the **Personalization** field. Only personalization codes that are not flagged for bypass or suppress, and that are not restricted based on item class, are available for selection.

   > **Note:**
   >
   > Continue with these steps if the selected code identifies custom, rather than standard, personalization. See *Add Standard Personalization to an Item* for the steps you use to add standard personalization.

   Personalization types that are restricted based on item class are not available for selection.
2. Once you define the type of personalization, the system displays the customization options that can be performed on the item, and optionally, the associated charge to apply the option to the item.
3. Optionally, update the **Personalization Charge** (*Personalization (Special Handling) Charge*) defined for a customization option. This field is labeled the

Charge when it is defined for a feature/option associated with a custom special handling format, rather than the Item Offer.

You cannot update the **Personalization Charge** in *Order Entry*.

No charge is displayed when the charge is defined in the Item Offer, but the **Special handing** type is not assigned to the Item Offer.

You can update the personalization charge when maintaining the order only if you have authority to the *Enter or Override S/H Price (B12)* secured feature.

4. Enter a value (*Personalization (Special Handling) Custom Response*) for each customization option (*Personalization (Special Handling) Custom Label*) that is required.
   - The customization option is a drop down box if a list of valid responses exists for the option. You must select a valid response from the list.
   - If valid responses are defined, the response description displays regardless of the setting of the *Display Special Format Response Descriptions in Order Entry (E90)* system control value.
   - For text fields, you can enter upper and lower case text if the *Enter Custom Special Handling in Upper and Lower Case (D65)* system control value is selected. Otherwise, your entries are converted to upper case.
   - If a **Default Response** was defined for the special handling format, this response defaults; however, any **Default Text** such as name and address defined for the special handling format does not default in order entry.
   - If a customization option has been defined with a maximum amount of characters that can be used, the system displays the remaining number of characters allowed below the input field. The *Include Spaces in Special Handling Edit for Maximum Characters (F80)* system control value controls whether the system includes spaces in the number of characters of text used. For example, if this system control value is selected, and you enters `Julie Marie` in the text field, the system considers this name to be 11 characters. If this system control value is unselected, the system considers the name `Julie Marie` to be 10 characters.
5. Optionally, enter a value for any customization options that are not required.
6. Optionally, update the **Charge** (*Personalization (Special Handling) Custom Charge*) for a custom label.
   - The **Charge** field displays only if a **Default Price** or **Default Price %** is defined for the special format detail, the **Feature/option** field for the special format detail is selected, and a **Special Handling Price** is not defined for the item offer or SKU offer. You cannot update the **Charge** in *Order Entry*.
   - You can add or remove a charge when maintaining an order only if you have authority to the *Enter or Override Personalization Charge (A40)* secured feature.
7. Select **OK**. The system validates your entries. An error message displays if:
   - You do not define a value for a required field.
   - You enter a negative number in the **Charge** field.
8. If the updates are successful, you return to the previous page:
   - If you were entering an order, you return to the *Items (Order Entry Step 3)* step, or whichever step you were using when you clicked the **Personalize** link for the item. Any personalization charges are indicated in the Order Summary panel.
   - If you were updating an order, you return to the *Order Summary* page.

Multiply charges by order line quantity? If the *Evaluate Special Handling Charges by Order Line (D67)* system control value is unselected, the charge for the special handling will be multiplied by the number of units ordered; otherwise, it will be added just once for each order line associated with custom special handling. The charge is added to the **Personalization** bucket of the order totals. For example, if the system control value is unselected:

- Line 1: Item A1000 in blue, quantity 5: special handling charges = $25.00
- Line 2: Item A1000 in red, quantity 1: special handling charges = $5.00
- Total special handling charges = $30.00

Add Standard Personalization to an Item

1. Depending on whether a custom **S/H code** is defined for the Item Offer or SKU Offer associated with the offer on the order line:
   - **Standard personalization assigned to item?** If a standard **S/H code** is defined for the Item Offer or SKU Offer associated with the offer on the order line, the system defaults this personalization code to the **Personalization** field.
   - **Custom personalization assigned to item?** If a custom S/**H code** is defined for the Item Offer or SKU Offer associated with the offer on the order line, the system defaults this personalization code to the **Personalization** field. See *Add Custom Personalization to an Item* for the steps you use to add custom personalization.
   - **No personalization type assigned, but personalization supported?** If a **S/H code** is not defined for the Item Offer or SKU Offer associated with the offer on the order line, but the **Special handling** setting for the Item Offer or SKU Offer is selected, you can select a personalization code from the **Personalization** field. Only personalization codes that are not flagged for bypass or suppress, and are not restricted based on item class, are available for selection.

   > **Note:**
   >
   > Continue with these steps if the selected code identifies standard, rather than custom, personalization. See *Add Custom Personalization to an Item* for the steps you use to add custom personalization.

   Personalization types that are restricted based on item class are not available for selection.
2. Select a standard Personalization option (*Personalization (Special Handling)*.
3. Optionally, enter the **Personalization Charge** (*Personalization (Special Handling) Charge*). You cannot update the **Charge** in *Order Entry*.
4. Optionally, enter the **Instructions** *Personalization (Special Handling) Instructions*).
5. Select **OK**. The system validates your entries.
6. If the updates are successful, you return to the previous page:
   - If you were entering an order, you return to the *Items (Order Entry Step 3)* step, or whichever step you were using when you clicked the **Personalize** link

for the item. Any personalization charges are indicated in the Order Summary panel.

- If you were updating an order, you return to the *Order Summary* page.

Multiply charges by order line quantity? If the *Evaluate Special Handling Charges by Order Line (D67)* system control value is unselected, the charge for the special handling will be multiplied by the number of units ordered; otherwise, it will be added just once for each order line associated with custom special handling. The charge is added to the **Personalization** bucket of the order totals. For example, if the system control value is unselected:

- Line 1: Item A1000 in blue, quantity 5: special handling charges = $25.00
- Line 2: Item A1000 in red, quantity 1: special handling charges = $5.00
- Total special handling charges = $30.00

Fields on Add Personalization

Purpose: The following information displays on the **Add Personalization** window.

- *Item Description* (unlabeled field below the **Add Personalization** title)
- *Item ID* (unlabeled field to the right of the **Item Description)**
- *SKU Description* (unlabeled field below the **Item Description** and **Item ID**.
- **Personalization** (*Personalization (Special Handling)*)
- **Personalization Charge** (*Personalization (Special Handling) Charge*): This field displays only if a **Special Handling Price** is defined for the item offer or SKU offer.

The remaining fields in this window vary depending on whether the personalization format is custom or standard.

Custom Personalization Fields

The following fields display based on the personalization selected in the **Personalization** field. A custom label displays for each option that can be performed on the item, and optionally, the associated charge to apply the option to the item.

- **Label** *Personalization (Special Handling) Custom Label*: the name of the label is defined in the Special Handling Format table; you can create and work with custom special handling formats using the **Work with Special Handling Formats (WSHF)** menu option. An asterisk (*) displays to the left of the label if a response is required.
- **Input** *Personalization (Special Handling) Custom Response*. If the *Display Special Format Response Descriptions (E90)* system control value is selected, the response description displays rather than the response itself.

Default response: If a **Default Response** is defined for the special handling format, this response defaults when you are adding personalization.

Default text: If any **Default Text**, such as the customer's name or address, is defined for the special handling format, it defaults at the **Add Personalization** window when you maintain the order; however, it does not default in Contact Center order entry.

> **Note:**
>
> If the default text exceeds the character limit defined for the custom special handling format, only the number of characters defined as the limit default. For example, if the default text is ABCDEFG, but a limit of 5 characters applies, then only ABCDE defaults.

- **Charge** *Personalization (Special Handling) Custom Charge*: This field displays only if a **Default Price** or **Default Price %** is defined for the special format detail, the **Feature/option** field for the special format detail is selected, and a **Special Handling Price** is not defined for the item offer or SKU offer.

> **Note:**
>
> The personalization charge is display-only in order entry.

For more information:

- *Add Personalization* for an overview of the **Add Personalization** window.
- *Add Personalization Options* for step-by-step instructions on the actions you can perform on the **Add Personalization** window.

Standard Personalization Fields

The following fields display when standard personalization has been defined for an item, supporting the entry of free-form text.

- **Personalization Charge** *Personalization (Special Handling) Charge*. Optional entry in order maintenance; display-only in order entry.
- **Instructions** *Personalization (Special Handling) Instructions*. Optional entry.

For more information:

- *Add Personalization* for an overview of the **Add Personalization** window.
- *Add Personalization Options* for step-by-step instructions on the actions you can perform on the **Add Personalization** window.

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Edit Personalization Information

Purpose: Use the **Edit Personalization Information** window to update the personalization defined for an item on an order.

How to display: Select the **Edit** option on the *Personalization Information* window.

The **Edit** option is available only if you advanced to the **Personalization Information** window from the *Order Summary* page, or in *Order Entry* after you added the item to the order and defined personalization information.

Also, if you are at the *Order Summary* page, the window is available only if:

- You have authority to edit order information,
- The order is not currently locked by another user, session, or by the system, and
- The order line is open or held, and unprinted.

For more information:

- *Edit Personalization Information Options* for step-by-step instructions on the actions you can perform on the **Edit Personalization Information** window.
- *Fields on Edit Personalization Information* for a description of the fields on the **Edit Personalization Information** window.
- *Personalization Overview* for an overview on personalization.

Add personalization: To add personalization for an order line, select the **Personalize** option for an order line in the *Order Lines Panel* on the *Order Summary* page. See *Add Personalization* for more information.

Edit Personalization Information Options

Purpose: You can perform the following actions on the **Edit Personalization Information** window.

- *Update Custom Personalization Information*
- *Update Standard Personalization Information*

For more information:

- *Edit Personalization Information* for an overview of the **Edit Personalization Information** window.
- *Fields on Edit Personalization Information* for a description of the fields on the **Edit Personalization Information** window.

Add personalization: To add personalization for an order line, select the **Personalize** option for an order line in the *Order Lines Panel* on the *Order Summary* page. You can also add personalization in *Order Entry*. See *Add Personalization* for more information.

Update Custom Personalization Information

1. Optionally, update the **Personalization Charge** (*Personalization (Special Handling) Charge*).

   This field displays only if a **Special Handling Price** is defined for the item offer or SKU offer.

   You can update the personalization charge only if you have authority to the *Enter or Override S/H Price (B12)* secured feature.

   You cannot update this field in *Order Entry*.

2. Optionally, update the **Input** *Personalization (Special Handling) Custom Response* for a custom label (*Personalization (Special Handling) Custom Label*).

   The **Input** is a drop down box if a list of valid responses exists for the label. You must select a valid response from the list.

   If valid responses are defined, the response description displays regardless of the setting of the *Display Special Format Response Descriptions in Order Entry (E90)* system control value.

   For text input fields, you can enter upper and lower case text if the *Enter Custom Special Handling in Upper and Lower Case (D65)* system control value is selected.

   If an input has been defined with a maximum amount of characters that can be used, the system displays the remaining number of characters allowed below the input field. The *Include Spaces in Special Handling Edit for Maximum Characters (F80)* system control value controls whether the system includes spaces in the number of characters of text used. For example, if this system control value is selected, and you enters `Julie Marie` in the text field, the system considers this name to be 11 characters. If this system control value is unselected, the system considers the name `Julie Marie` to be 10 characters.

3. Optionally, update the **Charge** *Personalization (Special Handling) Custom Charge* for a custom label.

   This field displays only if a **Default Price** or **Default Price %** is defined for the special format detail, the **Feature/option** field for the special format detail is selected, and a **Special Handling Price** is not defined for the item offer or SKU offer.

   You can add or remove a charge only if you have authority to the *Enter or Override Personalization Charge (A40)* secured feature.

   You cannot update this field in *Order Entry*.

4. Select **OK**. The system validates your entries. An error message displays if:

   - You do not define a value for a required field.
   - You enter a negative number in the **Charge** field.

5. If the updates are successful, the system returns you to the previous window and displays a message indicating the personalization was updated.

If the *Evaluate Special Handling Charges by Order Line (D67)* system control value is unselected, the charge for the special handling will be multiplied by the number of units ordered; otherwise, it will be added just once for each order line associated with custom special handling. The charge is added to the **Personalization** bucket of the order totals. For example, if the system control value is unselected:

- Line 1: Item A1000 in blue, quantity 5: special handling charges = $25.00
- Line 2: Item A1000 in red, quantity 1: special handling charges = $5.00
- Total special handling charges = $30.00

Update Standard Personalization Information

1. Optionally, update the **Personalization Charge** (*Personalization (Special Handling) Charge*). You cannot update this field in *Order Entry*.
2. Optionally, update the **Instructions** *Personalization (Special Handling) Instructions*). Note that information added in the Classic View of Order Administration is all upper case, while information added in Contact Center can be upper and lower case. Also, instructions entered in the Classic View of Order Administration as separate lines are concatenated in Contact Center into a continuous line.
3. Select **OK**. The system validates your entries.
4. If the updates are successful, you return to the previous window, where a message indicates the personalization was updated.

If the *Evaluate Special Handling Charges by Order Line (D67)* system control value is unselected, the charge for the special handling will be multiplied by the number of units ordered; otherwise, it will be added just once for each order line associated with custom special handling. The charge is added to the **Personalization** bucket of the order totals. For example, if the system control value is unselected:

- Line 1: Item A1000 in blue, quantity 5: special handling charges = $25.00
- Line 2: Item A1000 in red, quantity 1: special handling charges = $5.00
- Total special handling charges = $30.00

Fields on Edit Personalization Information

Purpose: The following information displays on the **Edit Personalization Information** window.

- *Item Description* (unlabeled field below the **Edit Personalization Information** title)
- *Item ID* (unlabeled field to the right of the **Item Description)**
- *SKU Description* (unlabeled field below the **Item Description** and **Item ID**.
- **Personalization** (*Personalization (Special Handling)*): This is the code and description of the additional charge code used to add the personalization for the item.
- **Personalization Charge** (*Personalization (Special Handling) Charge*): This field displays in this position for standard personalization, and for custom personalization only if a **Special Handling Price** is defined for the item offer or SKU offer.

The remaining fields in this window vary depending on whether the personalization format is custom or standard.

Custom Personalization Fields

The following fields display when custom personalization has been defined for an item, allowing you to help the customer define exactly how the item will be personalized.

A custom label displays for each option that can be performed on the item, and optionally, the associated charge to apply the option to the item.

- **Label** *Personalization (Special Handling) Custom Label*: The name of the label is defined in the Special Handling Format table; you can create and work with custom special handling formats using the **Work with Special Handling Formats (WSHF)** menu option. An asterisk (*) displays to the left of the label if a response is required.
- **Input** *Personalization (Special Handling) Custom Response*. If the *Display Special Format Response Descriptions (E90)* system control value is selected, the response description displays rather than the response itself.
- **Charge** *Personalization (Special Handling) Custom Charge*: This field displays only if a **Default Price** or **Default Price %** is defined for the special format detail, the **Feature/option** field for the special format detail is selected, and a **Special Handling Price** is not defined for the item offer or SKU offer.

For more information:

- *Edit Personalization Information* for an overview of the **Edit Personalization Information** window.
- *Edit Personalization Information Options* for step-by-step instructions on the actions you can perform on the **Edit Personalization Information** window.

Standard Personalization Fields

The following fields display when standard personalization has been defined for an item, supporting the entry of free-form text.

- **Personalization Charge** *Personalization (Special Handling) Charge*
- **Instructions** *Personalization (Special Handling) Instructions*. Note that instructions entered in the Classic View of Order Administration are all upper case, while instructions entered in Contact Center can be upper and lower case. Also, instructions entered in the Classic View of Order Administration as separate lines are concatenated in Contact Center into a continuous line.

For more information:

- *Edit Personalization Information* for an overview of the **Edit Personalization Information** window.
- *Edit Personalization Information Options* for step-by-step instructions on the actions you can perform on the **Edit Personalization Information** window.

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Drop Ship Details

Purpose: Use the **Drop Ship Details** window to review additional information about a drop ship item that is fulfilled through integration with Order Orchestration's Supplier Direct Fulfillment module.

How to display:

- In the *Order Lines Panel* of the *Order Summary* page, select the **Drop Ship** link.
- In the *# Order Lines In This Invoice Panel* of the *Invoice* page, select the **Drop Ship** link.

> **Note:**
>
> The **Drop Ship** link displays only for open drop ship items. The system considers an item a drop ship item if the **Drop Ship Flag** in the Order Detail table is set to **D**.

If Order Orchestration purchase order activity does not exist for the drop-ship item: If you do not use the Order Orchestration Supplier Direct Fulfillment integration to process drop-ship items (the **Drop Ship Output** field for the vendor assigned to the drop-ship item is set to **OROB drop shipping**), or if you use this integration but transactions do not exist for the drop-ship item in the CSF Transaction table, the system displays an empty **Drop Ship Details** window with the following message: `Drop ship purchase order activity does not exist for this drop ship item.`

For more information:

- *Drop Ship Details Options* for step-by-step instructions on the actions you can perform on the **Drop Ship Details** window.
- *Fields on Drop Ship Details* for a description of the fields on the **Drop Ship Details** window.
- **Supplier Direct Fulfillment Processing** in the Classic View online help for background information.

Drop Ship Details Options

Purpose: No additional actions are available on the **Drop Ship Details** window.

For more information:

- *Drop Ship Details* for an overview of the **Drop Ship Details** window.
- *Fields on Drop Ship Details* for a description of the fields on the **Drop Ship Details** window.

Fields on Drop Ship Details

Purpose: The following information displays on the **Drop Ship Details** window.

- *Item Description* (unlabeled field below the **Drop Ship Details** title)
- *Item ID* (unlabeled field to the right of the **Item Description**)
- *SKU Description* (unlabeled field below the **Item Description** and **Item ID**)
- *Vendor*. The vendor code and description are indicated.
- *Original Expected Ship Date*
- *Revised Expected Ship Date*, if any
- *Drop Ship Status*: The drop ship status is the most recent status of the drop ship item.

Activity Table

The **Activity** table tracks the status of a drop ship item fulfilled through integration with Order Orchestration's Supplier Direct Fulfillment module.

Drop ship activities display in descending activity date and time sequence.

For each activity, the table displays the following fields:

- **Date** (*Drop Ship Activity Date*)
- **Description** (*Drop Ship Activity Description*)

> **Note:**
>
> The system does not display activities that are in error or the activities `Cost Change` or `AP Invoice Received`.

For more information:

- *Drop Ship Details* for an overview of the **Drop Ship Details** window.
- *Drop Ship Details Options* for step-by-step instructions on the actions you can perform on the **Drop Ship Details** window.

49 Broker Details

Purpose: Use the **Broker Details** window to review the details of an order line that:

- Was backordered and submitted to the Order Broker for fulfillment (brokered backorder), even if the line was not fulfilled through the Order Broker and has returned to standard warehouse processing or has shipped, or
- Is on an order that:
  - Originated in Order Administration, and the customer picks up at a store location where the merchandise is already available (store pickup order), or
  - Originated in Order Administration, and ships to a store location where the customer picks it up (ship-for-pickup order), or
  - The Order Broker sent to Order Administration for shipment directly to the customer (delivery order), or
  - The Order Broker sent to Order Administration for shipment to the originating store location, where the customer picks it up (pickup order).

Each field on this window is display-only.

> **Note:**
>
> This window does not display activity related to changing the setting of the order's **Under Review** flag in Order Orchestration based on the order's hold status in Order Administration. This activity can occur if the *Send Held Orders to OROB (M18)* system control value is selected; see that system control value for a discussion.

How to display:

- In the *Order Lines Panel* of the *Order Summary* page, select the **Brokered** link for an item.
- In the *# Order Lines In This Invoice Panel* of the *Invoice* page, select the **Brokered** link for an item.

> **Note:**
>
> The **Brokered** link displays only for items fulfilled through integration with the Order Broker.

For more information:

- *Broker Details Options* for step-by-step instructions on the actions you can perform on the **Broker Details** window.
- *Fields on Broker Details* for a description of the fields on the **Broker Details** window.

- **Order Broker Integration** in the Classic View online help for background on different types of orders fulfilled through integration with Order Orchestration's Order Broker module.

Broker Details Options

Purpose: No additional actions are available on the **Broker Details** window.

For more information:

- *Broker Details* for an overview of the **Broker Details** window.
- *Fields on Broker Details* for a description of the fields on the **Broker Details** window.

Fields on Broker Details

Purpose: The following information displays on the **Broker Details** window.

- *Item Description* (unlabeled field below the **Broker Details** title)
- *Item ID* (unlabeled field in parentheses to the right of the **Item Description**)
- *SKU Description* (unlabeled field below the **Item Description** and **Item ID**)
- Delivery Type (*Broker Delivery Type*): This field is blank if the delivery type is Brokered Backorder. The **Delivery Type** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Originating Location*
- *Pickup Location*: This field is blank if the order is shipped to the customer.
- *Request ID*: This field is blank for requests whose status is canceled, closed, rejected, ready, or waiting.
- *Last Inquiry*
- Current Status: The code and description of the current Order Broker Status of the order line. Note that there will not be a corresponding record for the status in the Activity Table if the current status was received from Order Orchestration in response to a status inquiry request.

Activity Table

The **Activity** table tracks the status of the brokered item. For each activity, the table displays the date and time of the activity, the status of the activity, the associated fulfilling location, and the quantity associated with the activity.

The system adds an activity to this table only when the status, fulfilling location, or quantity changes.

Multiple locations?

- If you use the split order and split line options and the Order Broker cannot find a single location to fulfill a brokered backorder line, it might split the across multiple fulfilling locations; splitting can occur either when the Order Broker initially receives the order, or if the first assigned location rejects the line and the Order Broker "reshops" it. The Use Split Order (L56) system control value controls this option in Order Administration, while the **Allow Split Order** and **Allow Split Line** *settings at*

Order Broker's Preferences screen control these options in Order Orchestration. In this situation, there is a single request ID assigned by Order Orchestration.

- If the *Create Separate Picks for Ship for Pickup Orders (L89)* system control value is selected and a line on a ship-for-pickup order splits across multiple warehouses for shipment, Order Administration creates a separate SubmitOrder request to Order Orchestration for each warehouse. In this situation, each SubmitOrder request creates a separate request ID assigned by Order Orchestration.

> **Note:**
>
> It is not possible to have a split line on other types of Order Orchestration orders.

Brokered activities display in descending activity date and time sequence.

- **Date** (*Order Broker Date*)
- **Status** (*Order Broker Status*)
- *Fulfilling Location*
- **Quantity** (*Fulfilling Location Quantity*)

For more information:

- *Broker Details* for an overview of the **Broker Details** window.
- *Broker Details Options* for step-by-step instructions on the actions you can perform on the **Broker Details** window.

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Order Line Message

Overview: Use the **Order Line Message** window to add or edit a message for an order line. This window is also entitled as follows from order entry:

- **Add Message** when you create a new order line message in order entry.
- **Edit Message** when you edit an existing order line message in order entry.

How to display:

- Select the **Add Order Line Message** option above the *Order Line Messages Table* at the *Order Line Details* page.
- In order entry, select the **+** option at the *Messages Window (Items)*, or click the messages icon ( ) to the right of an item in the Order Summary panel or at the Review step, and select **+** or **Add Order Line Message**.

> **Note:**
>
> You can add a message from the *Order Line Details* page regardless of whether the order is locked and regardless of order status or whether the order includes a brokered backorder line, is from Order Orchestration (delivery or pickup), or is a store pickup order. Also, you do not need authority to the **Modify Existing Messages (A30)** secured feature to add an order line message.

To edit an existing message:

- Use the actions menu ( ) next to the message at the *Order Line Messages Table* at the *Order Line Details* page and select **Edit**.
- In order entry, click the messages icon ( ) to the right of an item in the Order Summary panel or at the Review step, and then use the actions menu ( ) next to the order line message to select **Edit**.

For more information:

- *Order Line Message Options* for step-by-step instructions on the actions you can perform on this window.
- *Fields on Order Line Message* for a description of the fields on the window.

Order Line Message Options

Purpose: The steps to add, edit, or delete an order line message are described below.

For more information:

- *Order Line Message* for an overview of the window.

- *Fields on Order Line Message* for a description of the fields on the window.

Add an Order Line Message

1. Optionally, select a **Message Template** (*Order Line Message Template*) to apply. This field is available only if one or more order line message templates have been defined in Work with Default Messages (WMSG) in Classic View).
2. Define the contents of the message in the **New Message** (*Order Line Message*) field to suit your needs. You can use a carriage return to enter more than one message lines. Your entry cannot exceed 100 positions total.
3. Use the **Print** setting (*Order Line Message Print Location*) to specify where the message should print. This field is required.
4. Select **OK**.

Update an Order Line Message

If you have authority under the **Modify Existing Messages (A30)** secured feature, you can update order line messages, including the **Message** content, the template, or the **Print** setting, by selecting the options icon ( ) next to a message and selecting **Edit**. See *Update an Order Line Message* for more information on updating an order line message.

Delete an Order Line Message

If you have authority under the **Modify Existing Messages (A30)** secured feature, you can delete an existing by selecting the options icon ( ) next to a message and selecting **Delete**. See *Delete an Order Line Message* for more information.

Fields on Order Line Message

Purpose: The following information displays on the Order Line Message window.

- **Message Template** (*Order Line Message Template*). Available only if one or more order line message templates have been defined in Work with Default Messages (WMSG) in Modern View.
- **New Message** (*Order Line Message*)
- **Print** (*Order Line Message Print Location*)

51 Payment Method Details

Overview: Use the **Payment Method Details** panel to review information about a payment method on an order. In addition:

- **Order Payment Method:** When you advance to this panel from the *Order Summary* page, the system displays the *Transactions Table*, allowing you to review the transactions performed against the payment method.
- **Invoice Payment Method:** When you advance to this panel from the *Invoice* page, the system displays the *Payment Method Totals Table*, allowing you to review the total charges for the invoice payment method.

How to display:

- In the *Payment Information Panel* of the *Order Summary* page, select the **View Details** option.
- In the *Invoice Payment Information Panel* of the *Invoice* page, select the **View Details** icon for a payment.

For more information:

- *Payment Method Details Options* for step-by-step instructions on the actions you can perform on the **Payment Method Details** panels. Note that you cannot perform any updates at these panels; you can only review data.
- *Fields on Payment Method Details* for a description of the fields on the **Payment Method Details** panels.

Payment Method Details Options

Purpose: Use the **Payment Method Details** panel to review information about a payment method on an order.

A payment method on an order. See the *Order Payment Method Fields*.

A payment method on an invoice. See the *Invoice Payment Method Fields*.

You cannot perform any other actions on this panel.

For more information:

- *Payment Method Details* for an overview of the **Payment Method Details** panel.
- *Fields on Payment Method Details* for a description of the fields on the **Payment Method Details** panel.

Fields on Payment Method Details

Purpose: The following information displays on the **Payment Method Details** panel.

- *Invoice Payment Method Fields*

  - *Summary Fields*
  - *Payment Method Totals*
- *Order Payment Method Fields*
  - *Transactions Table*
  - *Activity Table*

Invoice Payment Method Fields

The following information is displayed in the Payment Method Details panel when you open the panel by clicking the payment method on the *Invoice* page.

Summary Fields

- Merchant (authorization service) description: Merchants are defined through the Work with Authorization Services (WASV) menu option in Classic View. The description of the authorization is displayed, followed by the authorization service code in parentheses.
- *Expiration Date*
- *Deposit Created Date*: The date when the deposit was created. Set to 999999 when a deposit is rejected. Set to 888888 when a rejected deposit is written off. See *Manage Rejected Deposits*.
- *Deposit to Date*: The total amount deposited for the pay method, including merchandise, freight, additional freight, additional charges, handling and tax.

Payment Method Totals

Displays the Charges on the invoice, and the Invoice Total and Remaining Balance (unpaid total) for each charge, as described below. If there is no remaining balance for one of these totals, an amount of 0.00 is displayed. These charges include:

- *Merchandise*: Indicates the merchandise total for the invoice payment method and the remaining balance, if any.
- Prepaid Amount: The prepaid amount on the invoice payment method, if any.
- *Shipping*: Indicates the shipping total for the invoice and the remaining balance, if any.
- *Additional Shipping*: Indicates the additional shipping total and the remaining balance, if any.
- *Additional Charges*: Indicates the additional charges total and the remaining balance, if any.
- Personalization: Indicates the *Personalization (Special Handling) Charge* total and the remaining balance, if any.
- *Tax*: Indicates the total tax for the invoice payment method, including GST and PST, if any, but not including hidden tax, and the remaining balance, if any.
- *GST*: Indicates the total GST for the invoice payment and the remaining balance, if any.
- *PST*: Indicates the total PST for the invoice payment method and the remaining balance, if any.

- Order Level Shipping: Indicates the total freight charges, including shipping and additional shipping, and the remaining balance, if any.
- Order Level Shipping Tax: Indicates the total tax on shipping charges, and the remaining balance, if any.
- Adjusted Deposit Amount (the *Adjusted Amount*). Reduced by any prepayment amount applied to the deposit.

Items: Below this table, the items charged to the payment method are displayed, including the amount charged for each.

Order Payment Method Fields

The following fields are displayed in the Payment Method Details panel when you open the panel by selecting **View Details** from the actions panel for a payment method at the *Order Summary* page.

- *Payment Method* (unlabeled field below the **Payment Method Details** title)
  - The last four digits of the credit card number displays after the payment method description in parenthesis. For example: `VISA (1234)`.
  - The payment providers card scheme value such as `VISA` may be shown.
  - The expiration date.
  - The check number displays after the payment method description in parenthesis. For example: `Check (12345)`.
- *Issue Number*: This field displays only if an issue number is defined for a credit card payment method.
- *Start Date*: This field displays only if a start date is defined for the payment method.
- *Expiration*: The word **Expired** indicates that the authorization for the payment method has expired.
- *Account Number*: This field displays only for a check payment method.
- *Routing Number*: This field displays only for a check payment method.
- *Check Number*: This field display only for a check payment method.
- *Hold Reason*: If the order payment method status is **Held**, an attention icon displays to the left of the payment hold reason code and description. This field displays only when you advance to this panel from the *Order Summary* page.
- *Hold Until*: This field displays only when you advance to this panel from the *Order Summary* page.
- Deposit Created (*Deposit Created Date*)
- Deposit Amount to Date (*Deposit to Date*)
- *Suppress Deposit*

Transactions Table

The transactions performed against the payment method.

These transactions include:

- **Authorization**: The system displays any records in the Authorization History table associated with the order number and payment. The system processes an authorization against a card payment during online authorization or batch authorization processing.

- **Authorization Reversal**: The system displays any records in the Auth History SVC Reversal table associated with the order number and payment. The system processes an authorization reversal against a card payment when a cancellation amount is applied against the card or the card is deactivated and an open, unused authorization amount exists. Authorization reversals allow you to reimburse the card the amount that was initially charged against the card so the customer can use the amount to pay for future purchases.
  - Approved authorization reversals have a **Response** and **Approval Date**.
  - Declined authorization reversals have a **Response**, but a blank **Approval Date**.
- **Deposit - Purchase**: The system displays any records in the CC Deposit History table associated with the order number and payment whose **Transaction Type** is PURCH. The system processes a deposit against a card payment when you process deposits using the **Submit Deposits (SDEP)** menu option.
- **Deposit - Return**: The system displays any records in the CC Deposit History table associated with the order number and payment whose **Transaction Type** is RETURN.

> **Note:**
>
> Refunds may be split across multiple deposits when the payment method is PayPal; however, details about the split are not displayed at this window. See **Applying Refunds Against Multiple Capture Transaction IDs** in the Classic View online help for a discussion.

Transactions display in descending **Send Date** order.

- **Type** (*Payment Transaction Type*)
- **Status** (*Payment Transaction Status*)

  > **Note:**
  >
  > An authorization transaction record with a Status of Declined might be displayed if the CWOrderIn message that created the order included a transaction_id but no other authorization record. This authorization transaction record is displayed even if there is an authorized record immediately below it.

- **Amount** (*Payment Transaction Amount*)
- *Expiration*: The date when the authorization expires. Included only when the Status is Authorization.
- *Payment Processor Response*: The *Vendor Response 1*.
- *Address Verification Response*: The address verification response is blank for an authorization reversal transaction and deposit transaction.
- *Card Verification Response*: The *Vendor Response 2*
- **Sent Date** (*Payment Transaction Send Date*): The send date is blank for authorization reversal transactions. A sent time is also included for an

authorization. In the case of a writeoff or a resubmission the original Sent Date from the authorization is displayed.

- *Authorization Request Identification*: The Authorization Request ID, if any, received from the payment service, such as CyberSource.
- *Authorization Number* In the case of a writeoff, or a resubmission the original authorization number from the authorization is displayed.

Activity Table

The transactions performed against the payment method. This table displays only if you advanced to the Payment Method Details panel from the *Order Summary* page.

- *Activity:* Possible activity types include:
  - Credit Card Number Changed (A)
  - Billing (B)
  - Credit check (C)
  - Deposit (D)
  - Maintenance (M)
  - Net (N)
  - Reauthorization (R)
- *User:* The *User ID* of the user who performed the activity.
- *Invoice:* The invoice number is a link to the *Invoice* page.
- *Date:* The date and time when the activity took place.
- Note: A descriptive note about the activity. Depending on the type of activity, indicates:
  - The amount of the deposit that was confirmed or unconfirmed; the total amount is reduced by a writeoff or prepayment
  - The amount of a cash/check prepayment
  - The pay type code for a payment method that was added
  - A change to the credit card number
  - A change to the credit card expiration date, indicating the original expiration date and the new expiration date
  - The invoice number that was created
  - The date selected as the deposit release date
  - If the deposit was resubmitted
  - The change made for a maintenance activity, such as changing the expiration date
  - The writeoff amount, if the there was a full or partial writeoff

For more information:

- *Payment Method Details* for an overview of the **Payment Method Details** panel.
- *Payment Method Details Options* for step-by-step instructions on the actions you can perform on the **Payment Method Details** panel.

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Add Payment

Overview: Use the **Add Payment** window to add a new payment method to an order, either in order entry or from the *Order Summary* page.

Why add a payment to an existing order? You may wish to add a payment to an order that is on hold for a balance due. Adding the payment automatically releases the order from hold.

How to display:

- Select **Add Payment** at the Payment step in order entry. See *Add Payment*.
- Select the **Add Payment** option on the *Payment Information Panel* of the *Order Summary* page.

For more information:

- *Add Payment Options* for step-by-step instructions on the actions you can perform on the **Add Payment** page.
- *Fields on Add Payment* for a description of the fields on the **Add Payment** page.

Add Payment Options

Purpose: You can perform the following actions on the **Add Payment** window.

- *Add a Cash/Check Payment*
- *Add a Credit or Debit Card Payment*
- *Add a Gift Card (Stored Value Card) Payment*
- *Check a Gift Card's Balance*
- Edit the Payment Method (Clear Entries)

Restrictions:

- You cannot complete entry when applying the *Order Broker Payment Type (K98)* to an order; instead, the system displays an error indicating the payment method is restricted.
- You cannot add a PayPal payment to an order.

For more information:

- *Add Payment* for an overview of the **Add Payment** page.
- *Fields on Add Payment* for a description of the fields on the **Add Payment** window.

Add a Cash/Check Payment

1. Select **Add Payment** at the *Payment Information Panel* of the *Order Summary* page to open the *Add Payment* window.
2. Select a cash/check payment method from the *Payment Method* drop down box. The system identifies a payment as cash/check if its **Pay Category** in the **Work with Pay Types (WPAY)** menu option is set to **Cash/Check**.

3. Enter an *Amount to Charge* and click **OK**. The window displays additional fields.
4. Optionally, enter a *Routing Number*, *Account Number*, and *Check Number*.
5. Select **OK**. The system validates your entries. An error message indicates if the **Amount to Charge** field is blank.

If the payment passes validation, the system:

- Displays a message indicating the payment was added to the order.
- Displays the newly added payment in the *Payment Information Panel* on the **Order Summary** page. The charge sequence for the payment is set to 1.

A notification indicates if the amount to charge is greater than the order total.

Add a Credit or Debit Card Payment

Oracle Retail EFTConnect provides credit card validation and processing through *Account Providers* such as CyberSource and Adyen, external payment services (EPS), and other custom Oracle Payment Interface (OPI) payment services. You need to configure your merchant account and set up all credit card or debit card payment methods through the Payment Configurations page. See the Payment Configurations page for more information.

1. Select **Add Payment** at the *Payment Information Panel* of the *Order Summary* page to open the *Add Payment* window and lock the order.
2. Select a credit or debit card payment from the *Payment Method* drop down box.
3. Enter an *Amount to Charge*. This amount does not need to be equal to the order total. Leave this field blank if the payment method is the catch-all payment on the order.
4. Select **OK** to display the additional fields related to this payment method. These are dynamic fields that are validated by the payment provider. The content varies depending on whether CyberSource, Adyen, EPS or OPI custom payment provider was selected as the *Account Provider*.
5. Enter the required details such as a *Card Number*, the *Expiry Month* (MM format) and *Expiry Year* (YY format), the card's *Security Code* (CVV/CID/CVC) and other fields as applicable.
6. Select **Pay** to add the payment method to the order. The card is verified and a temporary token is returned. The system displays a message indicating the payment was added to the order.

If an error occurs whilst loading the service or after selecting **Pay**, and the payment provider form cannot be displayed, retry or select a new form of payment. You can close the window, select Edit, or select the hyperlink in the message.

- If the window is closed, payment is not added and the Payment page is displayed.
- Selecting Edit allows you to retry or change the payment method.
- Selecting the hyperlink in the error message tries to reload the form.

If the error persists you can retry, select a different payment method, or cancel the order. See the Payment Configurations page for more information.

Add a Gift Card (Stored Value Card) Payment

1. Select **Add Payment** at the *Payment Information Panel* of the *Order Summary* page to open the *Add Payment* window.

2. Select a gift card payment from the *Payment Method* drop down box.
3. Optionally, enter an *Amount to Charge*. This amount does not need to be equal to the order total. Leave this field blank if the payment method is the catch-all payment on the order.
4. Select **OK** to display the additional fields related to this payment method.
5. Enter a *Card Number*. The system validates the card number against the credit card length, leading digits, and modulus check settings defined for the payment method in the **Work with Pay Types (WPAY)** menu option.
6. Enter a *Start Date* in MM/YY format. The **Start Date** field displays only if the **Require Start Date** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option.
7. Enter an *Expiration Date* in MM/YY format. The **Expiration Date** field is required only if the **Require Expiration Date** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option; otherwise, optional
8. Enter an *Issue Number*. Displayed only if the **Require Issue #** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option.
9. Enter a *Card ID Number* if one is defined for the gift card.
10. Optionally, select the *Manual Authorization* field to apply a manual authorization to the gift card payment. You can then complete the additional displayed fields:
    - *Manual Authorization Amount*
    - *Authorization Date*
    - *Authorization Number*

> **Note:**
>
> The *Manual Authorization* field is available only if you have authority to the *C/C Authorization Field Access (A25)* secured feature.

11. Optionally, select the **Authorize Now** option to send/receive an online authorization transaction using the card token. The **Authorize Now** field displays only if the **Manual Authorization** field is unselected, the *Online Authorizations (B89)* system control value is selected, and the **Online Authorization** field for the origin on the order (order type) is set to **Window** or **Without Window**. If *On-Line Auth Verification Only I96* system control value is selected, the system will send an authorization for 0.00 instead of 1.00.
12. Select **OK** to add the payment method to the order. The system validates your entries. An error message indicates if:
    - The card number is blank.
    - The card number does not match the length defined in the **Credit Card Length** field for the payment in the **Work with Pay Types (WPAY)** menu option.
    - The card number does not pass the modulus check validation defined in the **Modulus Check** field for the payment in the **Work with Pay Types (WPAY)** menu option.
    - The leading digits of the card number do not match the leading digits defined in the **Leading Digits** field for the payment in the **Work with Pay Types (WPAY)** menu option.

- The **Start Date** is blank and the **Require Start Date** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option.
- The **Expiration Date** is blank and the **Require Expiration Date** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option.
- The **Issue Number** field is blank and the **Require Issue #** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option.
- The **Manual Authorization** field is selected and the **Manual Authorization Amount** field is blank.
- The **Manual Authorization** field is selected and the **Authorization Number** field is blank.
- The **Authorize Now** field is selected and an authorization service is not defined for the payment in the **Work with Pay Types (WPAY)** menu option.

13. If the payment passes validation, the system:
    - If the **Authorize Now** field is selected, send/receive an online authorization transaction using the card token. See *Online Authorization Processing* for processing details.
      – If you have defined a pop up window message for the vendor respons,e the system displays the *Authorization Response* window; otherwise, the system displays a message indicating the authorization was processed.
      – If the returned vendor response is associated with a hold reason code, the system places the order on hold and displays a message indicating the order has new holds.
    - Displays a message indicating the payment was added to the order.
    - Displays the newly added payment in the *Payment Information Panel* on the **Order Summary** page. The charge sequence for the payment is set to 2.

Check a Gift Card's Balance

When adding a gift card to the order: After selecting a gift card payment method, select **Check Gift Card Balance** at the *Add Payment* window to open the *Check Gift Card Balance* window.

For a gift card that is already on the order: Select **Check Gift Card Balance** from the **Actions** menu (⋮) for a gift card payment method on the order.

After you select **Check Gift Card Balance** the Check Gift Card Balance window opens.

1. Enter a valid gift card number in the *Card Number* field.
2. If the gift card is assigned an ID number, enter the ID in the *Card ID Number* field.
3. Select **Check Balance**. The system validates your entries. An error message displays if:
   - The card number is blank.
   - The card number does not match the length defined in the **Credit Card Length** field for the payment in the **Work with Pay Types (WPAY)** menu option.

- The card number does not pass the modulus check validation defined in the **Modulus Check** field for the payment in the **Work with Pay Types (WPAY)** menu option.
- The leading digits of the card number do not match the leading digits defined in the **Leading Digits** field for the payment in the **Work with Pay Types (WPAY)** menu option.

4. The system looks at the **Authorization Service** field defined for the gift card pay type to determine the service bureau that performs balance inquiries for the gift card pay type. An error message indicates if an authorization service is not defined for the payment in the **Work with Pay Types (WPAY)** menu option.
5. The system sends a balance inquiry request to the service bureau.
   - If the response returns an error, the system displays an error message at the top of the page.
   - If the vendor response returned matches a vendor response in the CC Vendor Response table, the system displays the message defined for the vendor response.
   - If the vendor response returned does not match a vendor response in the CC Vendor Response table, the system displays a message indicating the vendor response is not recognized and provides the error returned in the balance inquiry response.
   - If a response is not received from the service bureau, the system displays a message indicating the balance inquiry could not be performed.
   - If the response includes the card balance amount, the system displays the *Card Balance* at the bottom of the page.

> **Note:**
>
> The **Check Gift Card Balance** link is available only if you have authority to the **Stored Value Card Balance Inquiry (MSVB)** menu option.

Submit Order

After you complete payment entry at the Add Payment to Order step and select **Submit Order**, for payments configured through EFTConnect, an authorization request is submitted automatically using the temporary token. If the payment passes authorization:

- The order is saved.
- If you have defined a pop up window message for the vendor response received from the merchant account, the system displays the *Authorization Response* window; otherwise, the system displays a message indicating the authorization was processed.
- If the returned vendor response is associated with a hold reason code, the system places the order on hold and displays a message indicating the order has new holds.
- A *Snackbar Notification* indicates:
  - The assigned order number.
  - The customer name.
  - The customer number. If the *ORCE Customer Integration (L37)* system control value is set to INTERACT and the *Use Oracle Retail Customer Engagement Customer Number on Search* flag in Work with Contact Center (WWCC), this is the Customer Engagement ID. Otherwise, it is the Order Administration customer number.

– Whether the order status is held or closed; otherwise, the order status is open.

You can click the snackbar message to advance to the *Order Summary* page to review or work with the order; otherwise, select **Dismiss** in the snackbar message.

If the payment does not pass authorization such as:

If the temporary form token expires or the system times out before a response is received when submitting an order for payment authorization, the pay method is removed and you must re-enter payment.

If a response code of 31 (an error with the form token) is returned for the form token, or there is a communication issue during authorization, the order is put on hold.

See *Online Authorization Processing* for more information on processing, updates, and displayed messages when the payment method uses online authorization.

Edit the Payment Method (Clear Entries)

Select **Edit** from the **Actions** menu (⋮) for a payment method to open the **Edit Method** window. This option is available only for a cash/check payment method.

An **Edit** option is also available from the *Add Payment* window when you are first entering the payment method. Selecting the **Edit** option from this window clears any entries you have made in the window. You return to the initial view of the Add Payment window, with just the *Payment Method* and *Amount to Charge* retained.

Fields on Add Payment

Purpose: The following information is on the **Add Payment** window.

- *Payment Method*: When you select a payment method, the system displays additional fields related to the payment method. See:
  – *Cash/Check Payment*
  – *Credit Card Payment*
  – *Debit Card Payment*
  – *Gift Card Payment*

Cash/Check Payment

The following fields display when you select a cash/check payment from the **Payment Method** drop down box.

- *Amount to Charge*
- *Routing Number*
- *Account Number*
- *Check Number*

Credit Card Payment

The following fields display when you select a credit card payment from the **Payment Method** drop down box.

- *Card Number*

- *Start Date*: The **Start Date** field displays only if the **Require Start Date** field is selected for the pay type in the **Work with Pay Types (WPAY)** menu option.
- *Expiration Date*: The **Expiration Date** field is required only if the **Require Expiration Date** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option; otherwise, optional.
- *Issue Number*: The **Issue Number** field displays only if the **Require Start Date** field is selected for the pay type in the **Work with Pay Types (WPAY)** menu option.
- **Manual Authorization**: Select this option to apply a manual authorization to the credit card payment. If you select this option, you must complete the following fields:
  – *Manual Authorization Amount*
  – *Authorization Date*
  – *Authorization Number*

Note: The **Manual Authorization** field displays only if you have authority to the *C/C Authorization Field Access (A25)* secured feature.

- *Amount to Charge*
- **Authorize Now**: Select this option to send an online authorization transaction to the service bureau. **Note:** The **Authorize Now** field displays only if the **Manual Authorization** field is unselected, the *Online Authorizations (B89)* system control value is selected, and the **Online Authorization** field for the origin on the order is set to **Window** or **Without Window**.

> **Note:**
>
> If you leave the **Manual Authorization** and **Authorize Now** options unselected and the payment still requires authorization at pick slip generation time, the system will perform batch credit card authorization for the credit card payment during pick slip generation.

Debit Card Payment

The following fields display when you select a debit card payment from the **Payment Method** drop down box.

- *Card Number*
- *Start Date*: The **Start Date** field displays only if the **Require Start Date** field is selected for the pay type in the **Work with Pay Types (WPAY)** menu option.
- *Expiration Date*: The **Expiration Date** field is required only if the **Require Expiration Date** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option; otherwise, optional.
- *Issue Number*: The **Issue Number** field displays only if the **Require Start Date** field is selected for the pay type in the **Work with Pay Types (WPAY)** menu option.
- **Manual Authorization**: Select this option to apply a manual authorization to the credit card payment. If you select this option, you must complete the following fields:
  – *Manual Authorization Amount*
  – *Authorization Date*
  – *Authorization Number*

Note: The **Manual Authorization** field displays only if you have authority to the *C/C Authorization Field Access (A25)* secured feature.

- *Amount to Charge*
- **Authorize Now**: Select this option to send an online authorization transaction to the service bureau. **Note:** The **Authorize Now** field displays only if the **Manual Authorization** field is unselected, the *Online Authorizations (B89)* system control value is selected, and the **Online Authorization** field for the origin on the order is set to **Window** or **Without Window**.

> **Note:**
>
> If you leave the **Manual Authorization** and **Authorize Now** options unselected and the payment still requires authorization at pick slip generation time, the system will perform batch credit card authorization for the credit card payment during pick slip generation.

Gift Card Payment

The following fields display when you select a gift card payment from the **Payment Method** drop down box.

- *Card Number*
- *Start Date*: The **Start Date** field displays only if the **Require Start Date** field is selected for the pay type in the **Work with Pay Types (WPAY)** menu option.
- *Expiration Date*: The **Expiration Date** field is required only if the **Require Expiration Date** field is selected for the payment method in the **Work with Pay Types (WPAY)** menu option; otherwise, optional.
- *Issue Number*: The **Issue Number** field displays only if the **Require Start Date** field is selected for the pay type in the **Work with Pay Types (WPAY)** menu option.
- *Card ID Number*
- **Manual Authorization**: Select this option to apply a manual authorization to the credit card payment. If you select this option, you must complete the following fields:
  – *Manual Authorization Amount*
  – *Authorization Date*
  – *Authorization Number*

Note: The **Manual Authorization** field displays only if you have authority to the *C/C Authorization Field Access (A25)* secured feature.

- *Amount to Charge*
- **Authorize Now**: Select this option to send an online authorization transaction to the service bureau. **Note:** The **Authorize Now** field displays only if the **Manual Authorization** field is unselected, the *Online Authorizations (B89)* system control value is selected, and the **Online Authorization** field for the origin on the order is set to **Window** or **Without Window**.

> **Note:**
>
> If you leave the **Manual Authorization** and **Authorize Now** options unselected and the payment still requires authorization at pick slip generation time, the system will perform batch credit card authorization for the credit card payment during pick slip generation.

For more information:

- *Add Payment* for an overview of the **Add Payment** page.
- *Add Payment Options* for step-by-step instructions on the actions you can perform on the **Add Payment** page.

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Edit Payment

Overview: Use the Edit Payment window to update an existing cash or check payment method on an order.

> **Note:**
>
> You cannot use this window to update a credit card, gift/stored value card, PayPal, Bill Me Later, or Direct Bank Disbursement payment.

How to display: Select the **Edit** option for a payment method in the *Payment Information Panel* of the *Order Summary* page.

The **Edit** option is not available if:

- The order is already locked by another user, the system, or another session.
- You do not have authority to the **Enter/Maintain Orders (OEOM)** menu option in the Classic View of Order Administration. You can define menu option authority for a user ID in the **Work with Users (WUSR)** menu option; you can define menu option authority for a user class in the **Work with User Classes (WUCL)** menu option.
- The payment method is a credit card, debit card, or a stored value (gift) card.
- The payment method is PayPal.
- The payment method is deactivated.
- The order is a store pickup order or is from Order Orchestration (delivery or pickup), based on the *Broker Delivery Type*.

For more information:

- *Edit Payment Options* for step-by-step instructions on the actions you can perform on the **Edit Payment** window.
- *Fields on Edit Payment* for a description of the fields on the **Edit Payment** window.

Edit Payment Options

Purpose: You can update a cash or check payment method at the Edit Payment window.

> **Note:**
>
> You cannot use this window to update a credit card, gift/stored value card, PayPal, Bill Me Later, or Direct Bank Disbursement payment.

1. Optionally, update the *Routing Number*, *Account Number*, and *Check Number*.

2. Optionally, update the *Amount to Charge*. The **Amount to Charge** field is display-only if the payment has been billed.
3. Select the **Update Payment** option. The system validates your entries.
4. If the payment passes validation, the system:
   - Displays a message indicating the payment was updated.
   - Displays the updated payment information in the *Payment Information Panel* on the **Order Summary** page.

For more information:

- *Edit Payment* for an overview of the **Edit Payment** window.
- *Fields on Edit Payment* for a description of the fields on the **Edit Payment** window.

Fields on Edit Payment

Purpose: The following information displays on the **Edit Payment** window.

- *Amount to Charge*
- *Routing Number*
- *Account Number*
- *Check Number*

For more information:

- *Edit Payment* for an overview of the **Edit Payment** window.
- *Edit Payment Options* for step-by-step instructions on the actions you can perform on the **Edit Payment** window.

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Add Authorization

Overview: Use the **Add Authorization** window to authorize a card.

How to display: Select the **Add Authorization** option for a payment method in the *Payment Information Panel* of the *Order Summary* page, or from the *Add Payment* step in Contact Center Order entry.

The **Add Authorization** option is not available if:

- The order is already locked by another user, the system, or another session.
- You do not have authority to the Enter/Maintain Orders (OEOM) menu option in the Classic View of Order Administration. You can define menu option authority for a user ID in the Work with Users (WUSR) menu option; you can define menu option authority for a user class in the Work with User Classes (WUCL) menu option.
- The payment method is a cash or check.
- The payment method is deactivated.
- The order is a store pickup order or is from Order Orchestration (delivery or retail pickup (including ship-for-pickup)), based on the Broker Delivery Type.

For more information:

- *Add Authorization Options* for step-by-step instructions on the actions you can perform on the **Add Authorization** window.
- *Fields on Add Authorization* for a description of the fields on the **Add Authorization** page.

Add Authorization Options

Purpose: You can add authorization details for a credit card or gift/stored value card on the Add Authorization window:

1. Enter an *Authorization Amount* (*Manual Authorization Amount*).
2. Enter an *Authorization Date*.
3. Enter an *Authorization Number*.
4. Optionally, enter the *Authorization Request ID*. If the authorization service, such as CyberSource, requires the request ID and it is not entered, the subsequent authorization will fail.

> **Note:**
>
> The authorization is not displayed on the Payment Method Details window until the order goes through billing.

5. Select **OK**. The system validates your entries. An error message displays if the Expiration Date for the order payment method has passed. In this case, you will need to update the Expiration Date before applying the authorization.
6. If the entries pass validation, the system displays a message indicating the payment was updated.

In exception cases where there is no base payment integration, a retailer may configure a dummy pay type to work around an issue or give an appeasement to a customer. Any credit/stored value card pay type where it is not associated to an authorization or deposit service for payment processing, can use a dummy value. The dummy card without an authorization service is stored in the card_token field. If there is no authorization service, authorization is not required and the order can be picked and shipped without authorization.

For more information:

- *Add Authorization* for an overview of the **Add Authorization** window.
- *Fields on Add Authorization* for a description of the fields on the **Add Authorization** window.

Fields on Add Authorization

Purpose: The following information is on the **Add Payment** window.

- *Payment Method*: The last four digits of the credit card number displays after the payment method description in parenthesis. For example: VISA (1234). This is the CC Last 4 from the Order Payment Method table.
- Authorization Amount (*Manual Authorization Amount*)
- *Authorization Date*
- *Authorization Number*
- *Authorization Request ID*

For more information:

- *Add Authorization* for an overview of the **Add Authorization** window.
- *Add Authorization Options* for step-by-step instructions on the actions you can perform on the **Add Authorization** window.

55 Authorization Response

Overview: Use the **Authorization Response** window to review the authorization response received from the service bureau and any messages defined for the returned vendor response. You can receive a response from the service bureau for the authorization and address verification (AVS).

How to display: This window opens during online authorization processing when an online authorization response is received from the authorization service if:

- The **On-line Authorization** field for the order type on the order is set to **Window** (on-line eligible and display window), and
- A **Response Time** is defined for the service bureau, and
- The **Pop Up Window Messages** field for the vendor response returned by the service bureau contains text. **Note:** The **Pop Up Window Messages # 1** field must contain text in order to display this window. If you define text in the **Pop Up Window Messages # 2 - # 4** fields and not in the **Pop Up Window Messages # 1** field, this window will not display.

In this topic:

- *Online Authorization Processing*
  - *When is Online Authorization Performed?*
  - *Determining if the Payment is Eligible for Online Authorization*
  - *What Card Amount is Sent for Authorization?*
  - *Receiving an Authorization Response*
  - *What Happens When a Card is Approved?*
  - *What Happens When a Card is Declined?*
  - *When Communication Failures Occur*
  - *What Happens When an Undefined Response is Returned?*

For more information:

- *Authorization Response Options* for step-by-step instructions on the actions you can perform on the **Authorization Response** window.
- *Fields on Authorization Response* for a description of the fields on the **Authorization Response** window.

Online Authorization Processing

Purpose: Online card authorization allows you to send and receive the information required to authorize a card payment when the order is placed instead of when the pick slip is generated for the order.

When is Online Authorization Performed?

The system performs online authorization when you:

- Select the **Add Payment** option for a card payment on the *Add Payment* window when the **Authorize Now** field is selected.
- Select the **Update Payment** option for a card payment on the *Edit Payment* window when the **Authorize Now** field is selected.
- Select the **Authorize** option for a card payment on the *Order Summary* page.

Determining if the Payment is Eligible for Online Authorization

In order for a payment to be eligible for online authorization:

- The *Online Authorizations (B89)* system control value must be selected.
- The origin defined for the order must be eligible for online authorizations (the **Online Authorization** field is set to **Window** (on-line eligible and display window) or **Without Window** (on-line eligible and do not display window).
- The payment must be credit card, gift card, or debit card.
- The order must be in an open or held status.
- The arrival date on the order cannot be greater than the current date.

What Card Amount is Sent for Authorization?

- If the *Online Auth Verification Only (I96)* system control value is selected, the system processes online authorizations for $1.00 for the purpose of validating the card. During batch authorizations, the system authorizes the card for the shippable dollar amount and voids the online authorization for $1.00.
- If the *Online Auth Verification Only (I96)* system control value is unselected, the system looks at the setting of the *Authorize Full Amount During Order Entry (G99)* system control value to determine the amount sent for authorization.

The *Authorize Full Amount During Order Entry (G99)* system control value determines if the credit card is authorized for the full order amount or for the shippable amount on the order.

Authorize Full Amount

If the *Authorize Full Amount During Order Entry (G99)* system control value is selected, the system sends the entire dollar amount defined for the credit card for authorization.

If the Card is the Only Payment Method

The amount to authorize is the order total. The order total is the sum of all charges on the order, including: merchandise, freight, additional freight, tax, handling, additional charges, GST and PST.

If the Card is the Catch-All Payment Method

The amount to authorize is the remaining dollar amount not associated with another payment method on the order. The system subtracts the amount applied to any other payment methods from the order total.

```
order total - dollar amount associated with other payment methods =
amount to authorize for this card
```

Authorize Shippable Amount

If the *Authorize Full Amount During Order Entry (G99)* system control value is unselected, the system sends the dollar amount associated with what is shippable on the order, across all ship to customers, for authorization.

If the Card is the Only Payment Method

The shippable dollar amount includes:

- shippable merchandise amount, including drop ship items
- tax associated with the shippable merchandise amount
- total freight
- total additional freight
- total order level additional charges

> **Note:**
>
> The system sends the total freight and total additional freight for authorization, regardless of whether you are prorating freight charges (the *Prorate Freight Charges (D39)* system control value is selected).

If the Card is the Catch-All Payment Method

The amount to authorize is the remaining shippable dollar amount not associated with another payment method on the order. The system subtracts the amount applied to any other payment methods from the shippable dollar amount.

```
shippable dollar amount - dollar amount associated with other
payment methods = amount to authorize for this credit card
```

Excluded from Authorization

- Order lines with a future arrival date.
- Order lines on backorder, canceled, closed, or sold out.
- Reserved order lines that are coordinate grouped with an order line on backorder or with an order line with a future arrival date.

Regardless of Whether You Authorize the Full Amount or Shippable Amount

Included in Authorizations

- Express bill order lines.
- Drop ship order lines.
- Non-inventory order lines.

Cards Requiring Authorizations Less Than $1.00

If the credit card amount to authorize is less than $1.00 and you have defined an authorization number in the *Authorization Number for Authorizations Under $1.00 (I08)* system control value, the system does not send the credit card to the service bureau for authorization and instead assigns the authorization number from the system control value to the credit card. If an authorization number is not defined in this system control value, the system sends the credit card to the service bureau for authorization, regardless of the amount that requires authorization.

Receiving an Authorization Response

If an authorization response is received, the service bureau sends back an authorization response code, AVS response code (if performing address verification), CID response code (if performing credit card identification verification), authorization code, and date.

If a pop up window message has been defined for the vendor response received, the system displays the Authorization Response window. Also, if a hold reason code has been defined for the vendor response received, the system places the order on hold.

What Message Displays?

You can receive a response from the service bureau for the authorization, address verification (AVS), and credit card security identification (CID, CVV2, CVC2). If you receive a response for the authorization, AVS verification, and card security identification, the system uses the following hierarchy to determine the message that displays in the **Authorization Response** window:

1. **Authorization response has a message defined**: the message associated with the authorization response displays in the **Authorization Response** window.
2. **AVS response has a message defined**: if the authorization response does not have a message defined, the message associated with the AVS response displays in the **Authorization Response** window.
3. **Card security identification response has a message defined**: if the authorization response and AVS response do not have a message defined, the message associated with the card security response displays in the **Authorization Response** window.

Cybersource Decision Manager Fraud Scoring

When the service bureau associated with the online authorization transaction is Cybersource and you are using Cybersource Decision Manager Fraud Scoring:

- If the response code received from Cybersource is **400** Fraud Score Exceeds Threshold or **480** Review Fraud Scoring, the system places the order on **FS** Fraud Scoring Hold so that the order can be reviewed for possible fraud.
- If the response code received from Cybersource is **481** Rejected by Decision Manager, the system deactivates the payment method on the order and requires you to enter another form of payment before you can accept the order.

Hierarchy for Placing the Card on Hold

The card may be placed on hold if the card is not approved, the AVS verification fails, or the CID verification fails.

The system uses this hierarchy to determine if the credit card pay type should go on hold:

1. **Authorization response has a hold reason defined**: If the credit card charge is declined (not authorized), the credit card may be placed on hold (based on the

value in the **Hold Reason** field in the Vendor Response table). The order header is also placed on **AT** (declined credit card) hold. You must take the order header and credit card pay type off of hold and resend for authorization or cancel the order.

2. **AVS response has a hold reason defined**: If the credit card charge is approved (authorized) but the credit card fails the address verification check, the authorization may be placed on hold (based on the value in the **Hold Reason** field in the Vendor Response table). The order header is also placed on **AT** (declined credit card) hold. You must contact the customer and obtain correct address information, then take the order header and credit card pay type off of hold and resend for authorization or cancel the order.
3. **Card security identification response has a hold reason defined**: If the credit card charge is approved (authorized) and passes the address verification check, but the credit card fails the credit card security identification check, the credit card pay type may be placed on hold (based on the value in the **Hold Reason** field in the Vendor Response table). The order header is also placed on **AT** (declined credit card) hold. You must contact the customer to verify credit card ownership, then take the order header and credit card pay type off of hold and resend for authorization or cancel the order.

What Happens When a Card is Approved?

When a card is approved, the system:

- Displays the **Authorization Response** window if a vendor response pop up window message has been defined, the **Online Authorization** field for the order type is set to **Window** (on-line eligible and display window), and a **Response Time** is defined for the service bureau. The message should indicate the card has been approved.
- Places the order on hold if a hold reason code has been defined for the vendor response. Typically, if an authorization is approved, the order is not placed on hold. However, if the credit card is approved but fails address verification or card identification verification, you may want to place the order on hold.
- Creates a record in the On-Line Authorization table indicating the order number, that the credit card has been approved, the dollar amount authorized, the transaction sequence number, and the authorization number. The status for this authorization is ***UPDT**, indicating the on-line authorization has completed.
- Creates a record in the Authorization History table indicating the credit card has been approved, the authorization number, the date the credit card was authorized, and the dollar amount authorized. If you reject an order after the credit card has been approved, the system removes the record in the Authorization History table. You can review authorization history at the *Payment Method Details* window.

AVS Response

If the credit card charge is approved (authorized) but the order fails the address verification check and receives an AVS response that has a hold reason code, the system:

- Places the order on **AT** hold.
- Places the credit card payment method on the order on **AV** (AVS) hold.
- Creates an order transaction history message indicating the credit card was declined.
- Updates the record in the On-Line Authorization table indicating the credit card failed AVS. The **OLA AVS result** field is updated with the AVS response received from the service bureau. You can review the response at the *Payment Method Details* window.
- Updates the record in the Authorization History table indicating the credit card failed AVS. The **AUH status** field is updated to **O** (authorized but not used) and the AVS response

field is updated with the AVS response received from the service bureau. You can review the status of the credit card and the AVS response at the *Payment Method Details* window.

You must contact the customer and obtain correct address information, then take the order off of hold and resend for authorization.

If the authorization has not yet expired and the transaction passes AVS, the system updates the credit card authorization record from an **O** (authorized but not used) status to an **A** (approved) status. If the authorization has expired, the system updates the credit card authorization record from an **O** (authorized but not used) status to a **D** (declined) status and resends the credit card for authorization and address verification.

> **Note:**
>
> The system only performs address verification if the **Address Verification** field for the service bureau in the **Work with Authorizations Services (WASV)** menu option is selected.

Card Security Identification Response

If the card charge is approved (authorized) but the order fails the credit card security check and receives a card security identification response (CID, CVV2, CVC2) that has a hold reason code, the system:

- Places the order on **AT** hold.
- Creates an order transaction history message indicating the credit card was declined.
- Updates the record in the On-Line Authorization table indicating the credit card failed card security. The **OLA vendor response 2** field is updated with the card security response received from the service bureau. You can review the response at the *Payment Method Details* window.
- Updates the record in the Authorization History table indicating the credit card failed card security. The **AUH status** field is updated to **O** (authorized but not used) and the **Vendor response 2** field is updated with the card security response received from the service bureau. You can review the status of the credit card and the card security response at the *Payment Method Details* window.

You must contact the customer to verify card ownership, then take the order off of hold and resend for authorization.

If the authorization has not yet expired and the transaction passes card security identification, the system updates the credit card authorization record from an **O** (authorized but not used) status to an **A** (approved) status. If the authorization has expired, the system updates the credit card authorization record from an **O** (authorized but not used) status to a **D** (declined) status and resends the credit card for authorization and card security identification.

The system only performs credit card security identification if the card security presence and optionally card security value are included in the authorization transaction passed to the service bureau.

What Happens When a Card is Declined?

When a card is declined, the system:

- Displays the **Authorization Response** window if a vendor response pop up window message has been defined, the **On-line authorization** field for the order type is set to **Window** (on-line eligible and display window), and a **Response time** is defined for the service bureau. The message should indicate the credit card has been declined and any action you should take to correct the decline or inform the customer.
- Places the order on hold: If a hold reason code is defined for the vendor response, the system assigns this hold reason code to the order payment method and places the order header on **AT** (Declined Credit Card) hold. If the response received is not defined for the service bureau, the system places the order payment method on **AV** (Invalid Response Code) hold.
- Creates a record in the On-Line Authorization table indicating the order number, that the credit card has been declined, the dollar amount submitted for authorization, and the transaction sequence number. The status of this authorization is ***UPDT**, indicating the on-line authorization has been completed.
- Creates a record in the Authorization History table indicating the credit card has been declined, the reason why the credit card was declined, the date the credit card was declined, and the dollar amount submitted for authorization. If you reject the order after the credit card has been declined, the system removes the record from the Authorization History table. You can review authorization history at the *Payment Method Details* window.

You can send the credit card up for authorization again during order maintenance, using the **Perform Batch Authorization (SATH)** menu option, or during pick slip generation if the **Batch/on-line** field for the service bureau is set to on-line and batch authorizations.

When Communication Failures Occur

Communication failures can occur if the system times out before a response is received. If communication failures occur and you do not receive a response from the service bureau, the system:

- Does not display the **Authorization Response** window since a vendor response was not received.
- Creates a record in the On-Line Authorization table. The status of this authorization is:
  - **RDY**, indicating on-line authorization has not been performed.
  - **SENT**, indicating the on-line authorization transmission failed after the credit card was sent to the service bureau for authorization.
  - **RCVD**, indicating the on-line authorization transmission failed after a response was received from the service bureau, but final updates could not be completed.
- Creates a record in the Authorization History table indicating the credit card is waiting for authorization, the date the credit card was sent for authorization, and the dollar amount waiting for authorization.

The amount of time the system waits for an authorization is defined in the **Response time** field for the service bureau.

Grace Period

The system allows a 2 day grace period to receive a response from the service bureau if the status of the authorization is ***RDY**, ***SENT**, or ***RCVD**. To determine the grace period, the system takes the current date - the authorization sent date to determine the number of days. Once the 2 day grace period is passed, the system declines the transmission. You will need to resend the credit card for authorization during order maintenance or pick slip generation.

What Happens When an Undefined Response is Returned?

When an undefined response is returned, the system:

- Does not display the **Authorization Response** window since this vendor response has not been defined for the service bureau.
- Places the order on AVS hold.
- Creates a record in the On-Line Authorization table indicating the order number, that the credit card is waiting for authorization, the dollar amount waiting for authorization, and the transaction sequence number. The status of this authorization is ***RDY**, indicating on-line authorization has not been performed.
- Creates a record in the Authorization History table indicating the credit card is waiting for authorization, the date the credit card was sent for authorization, and the dollar amount waiting for authorization.

You can resend the order for authorization during order maintenance, using the **Perform Batch Authorization (SATH)** menu option, or during pick slip generation if the **Batch/on-line** field for the service bureau is set to on-line and batch authorizations.

Authorization Response Options

Purpose: At the Authorization Response window, select:

- **Edit Order** to update the payment information on the order if there is an issue with the current credit card information, so that the order can be resubmitted for authorization, or
- **Accept Order** to resubmit the payment method on the order without changing the payment method.

Resend Cards for Authorization

If you did not receive a response from the service bureau or the card was declined, you can resend the card for authorization:

- Select the **Update Payment** option for a card payment on the *Edit Payment* page when the **Authorize Now** field is selected.
- Select the **Authorize** option for a card payment on the *Order Summary* page.
- Use the **Perform Batch Authorization (SATH)** menu option. This menu option allows you to send credit cards associated with a selected ship via for authorization.
- During pick slip generation if the **Batch/Online** field for the service bureau contains a **C** (on-line and batch authorizations).

For more information:

- *Authorization Response* for an overview of the **Authorization Response** window.
- *Fields on Authorization Response* for a description of the fields on the **Authorization Response** window.

Fields on Authorization Response

Purpose: The following information displays on the **Authorization Response** window.

- *Payment Method* (unlabeled field below the window title)
- *Last 4 Digits of Payment Card*
- *Start Date*
- *Expiration Date*
- *Authorization Amount*
- *Issue Number*
- *Authorization Response*

For more information:

- *Authorization Response* for an overview of the **Authorization Response** window.
- *Authorization Response Options* for step-by-step instructions on the actions you can perform on the **Authorization Response** window.

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Order Activity

Purpose: Use the **Order Activity** page to review any type of activity that occurred since the order was entered, including order activity received through the Generic Order Transaction History API. The system logs all order activity automatically for inquiry purposes, including when the order was:

- Authorized or declined
- Canceled
- Held
- Maintained
- Released
- Logged as a sale (when the invoice was generated)
- Shipped
- Sold out

The system can record up to 999 transactions for each order. This information remains on the system for inquiry purposes until the order is purged.

How to display: Select the**Order Activity** option on the *Order Summary*, Messages, *Returns/Refunds*, or *Invoices* page, or from the **Recent Activity** tile in the *Order Summary Tiles*.

For more information:

- *Order Activity Options* for step-by-step instructions on the actions you can perform on the **Order Activity** page.
- *Fields on Order Activity* for a description of the fields on the **Order Activity** page.

Order Activity Options

Purpose: You can perform the following actions on the **Order Activity** page.

Order Activity Actions:

- *Sort the Order Activity*
- *Filter the Order Activity*

Order Actions:

- *Perform a New Search*
- *Review Order Summary*
- *Review or Work with Order Messages or Order Notes*
- *Review Refunds and Returns for the Order*
- *Review Invoices for the Order*

- *Unlock the Order*

For more information:

- *Order Activity* for an overview of the **Order Activity** page.
- *Fields on Order Activity* for a description of the fields on the **Order Activity** page.

Sort the Order Activity

You can sort on any column in the **Order Activity** table by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Order activity first displays on this page in descending activity date and time sequence.

Filter the Order Activity

The *Order Activity* page displays the first 15 order activity records for the order.

The page provides an entry field below the **Order Activity** panel with the message **Type to filter**. You can further refine the activities displayed in the *Order Activity Table* by entering one or more search terms found in any of the fields displayed in that table.

Example: Enter `pick`. The displayed activities include `Pick Slip Generated` as well as those with descriptions that include the word "pick" Next, enter a pick control number. Displayed results are now further restricted to activities that include both “pick” and the entered pick control number in any of the fields displayed in the *Order Activity Table*.

Matching records need to contain the search term, but do not need to start with the search term. For example, both `123.45` and `23.45` are matches for a search term of `23`.

Filtering is across all results: The filtering is not restricted to the activities displayed on the first page of results. For example, if the only activity matching your entry is on the third page of results, this activity is displayed.

Additional information on filtering:

- Only fields displayed at the *Order Activity Table* are available for filtering. For example, you can filter based on the description of an activity that took place for an order line, because the activity is displayed, but you cannot filter based on the item number.
- Filtering is not case-sensitive. For example, you can enter `shipment` or `SHIPMENT` to display shipments for the order.
- To filter based on activity date, include the date delimiters. For example, enter 8/27 rather than 827 to filter for an activity that took place on August 27.
- You can filter based on numeric fields to display partial matches. For example, if the pick control number includes 123, all activities that include 123 are included in the search results.

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.

Perform a New Search

Select **Search** or **Home** above the page to return to the tab that displays the *Search for Orders or Customers* page.

Review Order Summary

Select **Order Summary** at the top of the page to advance to the *Order Summary* page for the current order.

Review or Work with Order Messages or Order Notes

Select **Message** at the top of the page to advance to the Messages page for the current order.

Review Refunds and Returns for the Order

Select **Returns/Refunds** at the top of the page to advance to *Returns/Refunds* page.

Review Invoices for the Order

Select **Invoices** at the top of the page to advance to the *Invoices* page.

Unlock the Order

Select **Unlock Order** above the page or press CTRL + ALT + u to process any remaining order updates and unlock the order so that it available for maintenance by another user.

> **Note:**
>
> This option displays only if you have locked the order in the current session; it does not display if another user has locked the order. In this case, you can use the *Unlock Order* option if you have the required authority.

For more information: See *Maintaining an Order* for more information about locking and unlocking an order.

Fields on Order Activity

Purpose: The following information displays on the **Order Activity** page.

- *Order Activity Page Title*
- *Order Activity Table*

For more information:

- *Order Activity* for an overview of the **Order Activity** page.
- *Order Activity Options* for step-by-step instructions on the actions you can perform on the **Order Activity** page.

Order Activity Page Title

- **Order** (*Order Number*)

Order Activity Table

The **Order Activity** table tracks the first 500 updates performed against the order.

Order activities first display in descending activity date and time sequence.

For each activity, the table displays the following fields:

- **Date** (*Order Activity Date*)
- **Activity** (*Order Activity*)
- **Description** (*Order Activity Description*)
- **Amount** (*Order Activity Amount*)
- **User** (*Order Activity User*)
- **Ship-To** (*Ship-To Number*): This is the order ship-to number associated with the order activity.

57 Returns/Refunds

Overview: Use the **Returns/Refunds** page to review information related to the returns, exchanges, and refunds associated with an order. You can also schedule a courier pickup, view the courier pickup details, or cancel a courier pick up. In addition, this page displays whether an overpayment or balance due exists on the order.

How to display: Select the **Returns/Refunds** option on the *Order Summary*, *Order Activity*, Messages, or *Invoices* page.

When you first advance to this page, return and refund activity displays in chronological order, with the most recent activity at the top of the page.

In this topic:

For more information:

- *Returns/Refunds Options* for step-by-step instructions on the actions you can perform on the **Returns/Refunds** page.
- *Fields on Returns/Refunds* for a description of the fields on the **Returns/Refunds** page.

Refunds

Purpose: The system creates a refund any time there is a difference between the order total and the payment.

Refunds occur when:

- The customer returns an item.
- You cancel all or part of a prepaid order at the customer's request.
- You cancel all or part of a prepaid order because the merchandise is sold out.
- The system cancels all or part of a prepaid order through the Automatic Backorder Cancellation program.
- You cancel part of an order when the customer has already paid the entire freight amount.
- The customer's initial payment exceeds the total cost of the order (overpayment).
- The customer pays less than the order total (underpayment).

> **Note:**
>
> The system will never generate a refund for an order if you cancel an item on the order with a cancel reason whose **Generate Refund?** field is set to **3 Do Not Generate a Refund**.

Refund Types

There are several types of refunds:

- **Checks (K)** = A refund check can be cut for the exact amount of the refund.
- **Credit Card Credits (C)** = In addition to crediting the customer's credit card account, you can issue a credit card credit acknowledgment using the **Process Refunds (MREF)** menu option.
- **Stored Value Card Credits (V)** = The system generates a new gift card for the refund amount; the customer can use this gift card credit towards a new order.

The system generates a refund type that corresponds to the way the customer paid for the merchandise. For example, if the customer paid using a Visa card, the system generates a credit card credit. However, you can control how the money is refunded by defining an alternative refund type in the Pay Type table. You can also change the refund type by defining an alternate refund category.

How Pay Type Determines Refund Type

The pay type that a customer uses on an order determines the type of refund received, depending on how you have defined the pay type.

When you create a pay type, you must assign it to one of five payment categories. Each payment category automatically produces a certain refund type, as follows.

- **Payment Category Cash/Check (1)** produces **Refund Type Check**
- **Payment Category Credit Card (2)** produces **Refund Type Credit Card Credit**

Alternate Refund Type: When you define an alternate refund type for a pay type, the system automatically generates refunds of the alternate refund type. The system accepts only gift card or cash/check alternate refund types.

Alternate Refund Category: When you define an alternate refund category for a pay type, you give yourself the option of changing the refund to the type that corresponds to this category. The system accepts only cash/check alternate refund categories. However, you can change any type of refund to a gift card credit at the Change Refund Screen in the **Work with Refunds (WREF)** menu option.

Functions that Produce Refunds

Refunds are created from:

- Order entry (or order async): overpayment due to a sold out item or an initial amount more than what is owed (overpayment) or less than what is owed (underpayment)
- Order maintenance (returns or billing cancellations)
- Return authorization process (credit returns)
- Billing (automatic backorder cancellation)
- Auto Soldouts (auto soldouts program)

Refund Reason Codes

The system assigns each refund a reason code. These codes are:

- **A Auto Cancel Backorders** = This reason applies when a backorder item exists on an order and you process automatic backorder cancellations.
- **B Balance Due** = This reason applies when an order has an unpaid balance.
- **O Overpayment** = This reason applies when a customer pays more than the order total, when the customer cancels a prepaid item or order, or when an item on a prepaid order is sold out.
- **R Return** = This reason applies when a customer returns one or more items using a return authorization.
- **S Soldout** = This reason applies when a soldout item exists on an order and you process automatic soldout cancellations.

Placing Refunds on Hold

The system can hold a refund automatically or you can place them on hold.

Automatic holds occur when:

- The refund check amount is less than the minimum or more than the maximum amount specified in the Pay Type table; you can define these amounts in the **Work with Pay Types (WPAY)** menu option.
- The refund release days have not elapsed (this is used to hold refunds for an order paid by check until the check has cleared).

- The order that includes the refund is on hold.
- The cancel reason you used to cancel any item on the order had the **Generate refund?** field set to **2**.
- The refund is associated with *Credit Card Net Exchange Billing*.

You can also place a refund on hold manually through the **Work with Refunds (WREF)** menu option; for example, if you suspect a fraudulent customer.

Releasing Held Refunds

You can release refunds that are on hold. Releasing refunds from hold, however, does not mean that they will be processed if the order is on hold.

The system releases the refund automatically when the order hold is released or the refund release days pass. However, if the refund is on hold because it is more than the maximum for the pay type or because you put it on hold manually, you must release it through the **Work with Refunds (WREF)** menu option.

Writeoff Updates

When you write off a refund amount the system updates the customer record with the writeoff amount. The writeoff balance accumulates for the customer. You can apply the balance to a new order as a payment if it is a positive amount or as an additional charge if it is a negative amount.

Canceling a Refund

You can cancel a refund through the **Work with Refunds (WREF)** menu option if the refund was created by mistake or the customer is a fraud.

Issuing Refunds

Follow the guidelines below when you are working with refunds.

1. Print the Refund Due List.
2. Review the refunds that are ready for processing.
3. Check the order status and determine which held orders you want to release.
4. Determine which refunds you want to release from hold.
5. Use the Work with Refunds screen in the **Work with Refunds (WREF)** menu option to research refunds, to release, hold, cancel or writeoff a refund, or to change the type of refund to issue.
6. Reprint the Refund Due List so that you have a record of the changes you make to the refunds and to verify that you changed the refunds correctly.
7. Process refunds and writeoffs using the **Process Refunds (MREF)** menu option.
8. Reconcile checks you receive from the bank or void them as needed, and purge refund checks once reconciliation is complete using the **Reconciling Checks (MREC)** menu option.

Reprinting Refunds

If you have a problem printing the refund checks, you can reprint them with the **Reprint Refunds Screen (MREP)**.

Refund Bank

Whenever the system creates a refund record, it associates the refund with a bank code. The system determines the bank code as follows:

- When you created the source code used on the order header, you specified a division.
- When you created the division associated with the source code, you specified a bank. The system uses this bank code.

The system uses the bank code in one or more ways, depending on whether you process orders in multiple currencies.

- Even if you process orders in only one currency, you might use more than one bank for deposits and refunds. When you process refund checks, the system determines the next sequential check number to use by checking the Bank table.
- If you process an order in a foreign currency, you generate the refund in this currency as well. The system requires additional setup and validation when the *Multi Currency by Offer (E03)* system control value is selected; among other things, each currency is associated in Order Administration with a unique bank. The bank code that appears on the **Work with Refunds Screen (WREF)** indicates the currency that the customer used to pay for the order. Because the system requires a bank code when you process refunds, you can generate refunds in only one currency at a time. If you specify a dollar limit to generate for one of your refund types, the system interprets this limit in your local currency, but generates the refund in the customer's currency.

Suppressing Refunds

You can suppress refund processing:

- For orders you receive through the Generic Order Interface (Order API). You can use the **suppress_deposit_flag** and the **suppress_refund_flag** to suppress processing of deposits and refunds for orders you receive through the generic order interface. For example, it might not be appropriate to process a deposit or generate a refund for a retail outlet order if the transactions have already taken place at the store.
- For returns you receive through the Inbound Return API. You can use the **suppress_refund** in the Return Request Message (CWReturnIn) to indicate if you do not want to create a refund for the return. For example, it might not be appropriate to generate a refund for a POS order, when the transactions have already taken place at the store.

In this situation, the refund is generated in a cancel pending status.

Overpayment Refunds

An overpayment occurs when:

- A customer's initial payment on a prepaid (cash/check) order exceeds the total cost of an order.
- A customer cancels a prepaid item or order.
- An item on a prepaid order is sold out.

The system considers a refund an overpayment if the **Refund Reason** field for the refund is set to **O Overpayment**.

The total overpayment amount on an order does not include the price of any sold out items; the system automatically creates a refund record for sold out merchandise.

Balance Due Refunds

A balance due occurs when a customer pays less than the order total on a prepaid (cash/check) order.

The system considers a refund a balance due if the **Refund Reason** field for the refund is set to **B Balance Due**.

Balance Due Limit

If a customer short pays an order by an amount equal to or greater than this amount, the system places the order automatically on **BD (Balance Due)** hold.

Orders are evaluated for the **Balance Due Dollar Limit** and **Balance Due Percentage Limit** defined in the Pay Type table. Balance due percentage limit takes precedence over balance due dollar limit, so the system puts the order on hold when it is underpaid by the percentage even if it not underpaid by the dollar amount. When you apply a cash/check payment method:

- If there is a balance due percent limit specified, and the order is underpaid by this percentage, put the order on hold; otherwise,
- If there is a balance due dollar limit specified, and the order is underpaid by this amount, put the order on hold; otherwise,
- Do not put the order on hold for an underpayment.

Example: A customer underpays a $1,250.00 order by $25.00. The balance due dollar limit is $5.00; however, the balance due percent limit is 5%. Five percent of this order is $62.50. This order will not go on hold. The customer has underpaid by more than the balance due dollar limit but less than the balance due percent limit.

> **Note:**
>
> If the underpaid amount is less than the amount specified in the Balance Due Dollar Limit, and there is no Balance Due Percent Limit specified, the order does not go on hold. The system creates a balance due record (negative refund record) and puts this record into a write-off pending status. These refund write-off amounts accumulate for the sold-to customer, and can be applied to a subsequent order as an additional charge. The *Default Additional Charge Code (C45)* to be used in these instances is specified in the System Control table.

Flagging a Balance Due as a Write Off

If a refund is flagged as both a balance due and a write off, the write off setting will take precedence over the balance due setting. In this situation, the system does not display the Balance Due transaction on the **Returns/Refunds** page.

Returns and Exchanges

Purpose: Returns are processed in three stages:

1. *Create the Return Authorization*.
2. *Receive the Returned Merchandise into the Warehouse*.

3. *Credit the Customer for the Return*.

Return Authority

A separate secured feature controls the ability to perform each step of the return process. For example, an operator might have authority to create and receive a return, but not to perform the credit.

- *Enter Return Authorization (A28)* secured feature
- *Receive Return Authorization (A29)* secured feature
- *Credit Return Authorization (A34)* secured feature

The *Use Streamlined Return Authorizations (F44)* system control value controls whether you must perform the create, receipt, and credit as separate steps, or whether the return is automatically processed as far as your authority extends.

Performing a Return

You can perform a return using the following methods.

- *Posting a Return using Work with Return Authorizations (WRTA)*
- *Posting a Return in Order Entry*
- *Posting a Return using the Order API*
- *Posting a Return in Order Maintenance*
- *Posting a Return using the Inbound Return API*

Posting a Return using Work with Return Authorizations (WRTA)

When posting returns using the **Work with Return Authorization (WRTA)** menu option, the system looks at the setting of the *Use Streamlined Return Authorizations (F44)* system control value.

If the *Use Streamlined Return Authorizations (F44)* system control value is unselected, the return authorization process after you select an order consists of:

1. Creating one or more return authorizations.
2. Receiving the return(s) as a separate step.
3. Crediting the return(s) as a separate step.

You can perform all three steps through the **Work with Return Authorization (WRTA)** menu option. You can also perform the receipt and credit separately, using the **Receiving Returns (WRAR)** and **Crediting Returns (WRAC)** menu options respectively.

If the *Use Streamlined Return Authorizations (F44)* system control value is selected, the return authorization process after you select an order consists of selecting one or more items to return or exchange. At this time, the return is processed as far as your authority extends. For example, if you have create and receive but not credit authority, the return is automatically created and received at this time.

Once a return authorization has been created, or created and received, by one operator, another operator with greater authority must complete the return authorization processing.

Posting a Return in Order Entry

You can post a return in order entry by entering an order line with a negative quantity for the number of units of the item being returned.

When you post a return in order entry, the system performs the following updates:

- **RA Header table:** Creates a record in the RA Header table unless the *Use Streamlined Return Authorizations (F44)* system control value is selected and the *Create Return Download Triggers (K28)* system control value is unselected.
- **RA Detail table:** Creates a record for each negative order line on the order in the RA Detail table if the *Create Return Download Triggers (K28)* system control value is selected.
- **WRTA and Returns/Refunds page:** Displays the posted return in the **Work with Return Authorizations (WRTA)** menu option and the **Returns/Refunds** page only if the *Use Streamlined Return Authorizations (F44)* system control value is unselected and the *Create Return Download Triggers (K28)* system control value is selected. The return is entered, received, and credited.

> **Note:**
>
> - In order to post a return in order entry, you must have authority to the *Enter Return Authorization (A28)*, *Receive Return Authorization (A29)*, and *Credit Return Authorization (A34)* secured features.
> - The system displays returns posted in Order Entry on the **Returns/ Refunds** page only if the *Use Streamlined Return Authorizations (F44)* system control value is unselected and the *Create Return Download Triggers (K28)* system control value is selected.

Posting a Return using the Order API

You can post a return through the Order API by entering an order line with a negative quantity for the number of units of the item being returned.

When you post a return through the Order API, the system performs the following updates:

- **RA Header table:** Creates a record in the RA Header table unless the *Use Streamlined Return Authorizations (F44)* system control value is selected and the *Create Return Download Triggers (K28)* system control value is unselected.
- **RA Detail table:** Creates a record for each negative order line on the order in the RA Detail table if the *Create Return Download Triggers (K28)* system control value is selected.
- **WRTA and Returns/Refunds page:** Displays the posted return in the **Work with Return Authorizations (WRTA)** menu option and the **Returns/Refunds** page only if the *Use Streamlined Return Authorizations (F44)* system control value is unselected and the *Create Return Download Triggers (K28)* system control value is selected. The return is entered, received, and credited.

- In order to post a return using the Order API, you must have authority to the *Enter Return Authorization (A28)*, *Receive Return Authorization (A29)*, and *Credit Return Authorization (A34)* secured features.
- The system displays returns posted using the Order API on the **Returns/Refunds** page only if the *Use Streamlined Return Authorizations (F44)* system control value is unselected and the *Create Return Download Triggers (K28)* system control value is selected.

Posting a Return in Order Maintenance

You can post a return in order maintenance by selecting **Return** for an order line (to return an individual item) or by selecting **Return Order** for the order (to return the entire order).

When you post a return in order maintenance, the system performs the following updates:

- **RA Header table:** Creates a record in the RA Header table for the posted return. The RA is entered, received, and credited.
- **RA Detail table:** Creates a record for each order line returned in the RA Detail table. The RA detail is returned and credited.
- **WRTA and Returns/Refunds page:** Displays the return in the **Work with Return Authorizations (WRTA)** menu option and on the **Returns/Refunds** page. The RA is entered, received, and credited. If the *Use Streamlined Return Authorizations (F44)* system control value is selected, the RA displays in WRTA only if there are remaining lines on the order that are eligible for return. In addition, you cannot view the RA lines. Regardless of the setting of the *Use Streamlined Return Authorizations (F44)* system control value, the RA displays on the **Returns/Refunds** page.

In addition, you can also post a return in order maintenance by entering an order line for a negative quantity for the number of units being returned. In this situation, the system performs the same updates that occur when you post a return in order entry.

> **Note:**
>
> In order to post a return in Order Maintenance, you must have authority to the *Enter Return Authorization (A28)*, *Receive Return Authorization (A29)*, and *Credit Return Authorization (A34)* secured features.

Posting a Return using the Inbound Return API

You can use the Inbound Return API to create and process a return against an order detail line, based on a Return Request Message (CWReturnIn) received from an external system.

When you post a return through the inbound Return API, the system performs the following updates:

- **RA Header table:** Creates a record in the RA Header table for the posted return.
- **RA Detail table:** Creates a record for each order line returned in the RA Detail table.
- **WRTA:** Displays the posted return in the **Work with Return Authorizations (WRTA)** menu option. The return is entered, received, and credited.

> **Note:**
>
> The system does not require authority to the *Enter Return Authorization (A28)*, *Receive Return Authorization (A29)*, and *Credit Return Authorization (A34)* secured features in order to create, receive, and credit a return processed through the RETURN_IN job. The system creates the return without errors; however, if you do not have authority to these secured features, you cannot review the return in WRTA.

Create the Return Authorization

This occurs whenever you process a return through either **Work with Return Authorizations (WRTA)** or order maintenance; however, in order maintenance, it occurs automatically "behind the scenes." At this point, the system also writes a message to order history.

- The return authorization can be either a straight return (specify a return reason code), or an exchange (specify an exchange reason code).
- When you process an exchange you need to supply information about the exchange item. The *Require Exchange Item at Time of Receipt (F42)* system control value controls the point when you must supply this information (that is, at the time of creating or receiving the return).
- You can process multiple returns or exchanges against the same order line. For example, if a customer returns one unit because it is defective and wishes to exchange another unit for a different color, you can create two separate return authorizations for the item using a return reason code and an exchange reason code. Similarly, if the customer is returning two units for two different reasons, you can create two separate return authorizations for the item using the different return reason codes.
- You can also create a return authorization against all shipped, unreturned items on the order at once.

Receive the Returned Merchandise into the Warehouse

When you receive the returned merchandise, the receipt is processed through the ORDR_ASYNC job, which updates:

- Inventory for the item, including increasing on-hand in the item location and item warehouse, and adding an inventory transaction history record.
- The order, including the order detail and order line history.
- In the case of an exchange, adds the exchange item to the order.
- In the case of a misshipped item, adds the returned item to the order.
- The return authorization header and detail.

> **Note:**
>
> When you process an exchange, adding the exchange item reopens the order if it was closed. Adding a new line causes the order to move through the normal processing routines, which may cause the order to go on hold if, for example, the exchange item has a higher price and the customer paid by check.

Credit the Customer for the Return

The credit is processed through the ORDR_ASYNC and BILL_ASYNC jobs, which update:

- The order, including order history, and creating the credit invoice and refund, if appropriate.
- The return reason or exchange reason history for the offer.
- The return authorization header and detail record.

> **Note:**
>
> Refunds can be either positive (you owe the customer money) or negative (the customer owes you money).

Credit Card Net Exchange Billing

If the *Use CC Net Exchange Billing (M23)* system control value is selected and the order contains a credit card pay type, the system may hold the credit invoice for the return to net it against the debit invoice for the associated exchange in order to reduce the number of transactions that occur for an exchange. However, if you use net exchange billing, you should not process returns in Contact Center, and should use Classic View instead.

Returns/Refunds Options

Purpose: You can perform the following actions on the **Returns/Refunds** page.

- *Perform a New Search*
- *Review Order Summary*
- *Review Order Activity*
- *Review or Work with Order Messages or Order Notes*
- *Review Invoices for the Order*
- *Unlock the Order*
- *Schedule a Courier Pickup*
- *View the Courier Pickup Details*
- *Cancel a Courier Pickup*

For more information:

- *Returns/Refunds* for an overview of the **Returns/Refunds** page.
- *Fields on Returns/Refunds* for a description of the fields on the **Returns/Refunds** page.

Perform a New Search

Select **Search** or **Home** above the page to advance to the *Search for Orders or Customers* page.

Review Order Summary

Select **Order Summary** at the top of the page to advance to the *Order Summary* page for the current order.

Review Order Activity

Select **Order Activity** at the top of the page to advance to the *Order Activity* page for the current order.

Review or Work with Order Messages or Order Notes

Select **Message** at the top of the page to advance to the Messages page for the current order.

Review Invoices for the Order

Select **Invoices** at the top of the page to advance to the *Invoices* page.

Unlock the Order

Select **Unlock Order** above the page or press CTRL + ALT + u to process any remaining order updates and unlock the order so that it available for maintenance by another user.

> **Note:**
>
> This option displays only if you have locked the order in the current session; it does not display if another user has locked the order. In this case, you can use the *Unlock Order* option if you have the required authority.

For more information: See *Maintaining an Order* for more information about locking and unlocking an order.

Schedule a Courier Pickup

Select **Schedule a Courier Pickup** to schedule a courier to pick up a customer's return package and drop it off at a retailer's store location. See *Schedule a Courier Pickup* for more information.

View the Courier Pickup Details

Select **View the Courier Pickup Details** to view the details of a return that is already scheduled for courier pickup. *View the Courier Pickup Details* for more information.

Cancel the Courier Pickup

Select **Cancel a Courier Pickup** if the status of the pickup is pending or enroute. See *Cancel a Courier Pickup* for more information.

Returns via Oracle Retail Collect and Receive (CaR)

Order Administration is integrated into the Oracle Retail Collect and Receive Cloud Service (CaR). When configured, Order Administration allows a Courier (that is, Uber) to be scheduled to pick up a customer’s return package and drop it off at a retailer’s store location. For setup and configuration requirements, see the *Oracle Retail Collect and Receive Enterprise Returns Integration* section in the *Oracle Retail Order Administration Cloud Service Integration and Import/Export Guide*.

You can perform the following actions on the **Returns/Refunds** page.

- *Schedule a Courier Pickup*
- *View the Courier Pickup Details*
- *Cancel a Courier Pickup*

Schedule a Courier Pickup

The **Schedule Courier Pickup** button is located on the *Returns/Refunds* tab of an order in Modern View when all lines and units on the Return Authorization are not received, credited, or canceled and a courier pickup is not already scheduled.

First of all, the customer's address is checked to ensure it is eligible for a courier service to pickup their return items and take them back to a retail store/return center.

To schedule a courier pickup:

1. Select **Schedule Courier Pickup** to open the *Courier Pickup Return Authorization* screen.
2. Select a **Time Zone** from the drop-down list of North American time zones. The time zone selected is used to provide a list of dates and times available to select a pickup window where the package is to be picked up.

   The system will immediately check eligibility for a courier pickup using the Customer’s Ship-To Address from the originating order and select the nearest drop-off location to the customer’s address. If the eligibility check is successful, the screen display additional sections to **Select the Pickup Window** and enter **Package Details**. If unsuccessful, an error is displayed. **Edit** the pickup address and check eligibility again.

   > **Note:**
   >
   > If the pickup address is changed after a prior successful eligibility check, another eligibility check will be run.

3. From the **Select Pickup Window**, select a single 2-hour window between 8:00AM and 6:00PM that falls within the available store hours which will be provided to the courier for the pickup time range. If the local time is 10:05 AM (based on the time zone selected), the list of pickup window options will start at 12:00PM - 2:00PM. If the local time is 5:00 PM, and the pre-defined pickup windows end at 6:00 PM, then the current date is not displayed as an option for selection. Display the next 4 days and pickup windows.

   Drop-off Location Details and Store Hours can be defined within the Order Orchestration Location screen and will be returned in the Eligible Return Locations service for display.

> **Note:**
>
> Retailer's that implement the Courier Pickup capability, must ensure that all their location addresses are correct in OOCS and that they do not have duplicate location ID's across their enterprise. Once a drop off location ID is sent to Uber, Uber will always use the associated address that was originally sent. The retailer will need to work directly with Uber for any needed address changes/updates.

4. The size and number of packages being returned must be entered which will be provided to the courier for pickup through the CaR integration.

   Select **+Add Package for Pickup** to open the *Packages for Pickup Drawer* and set the number of packages for pickup. A package size must be selected for the number of packages entered. Options are:

   - Small (Can be carried with one hand)
   - Medium (Can be carried in a shopping bag)
   - Large (Needs two hands to carry)
   - X-Large (Heavy or odd size, requires two hands)

   Select **OK** button when done to confirm the package count and sizes. The **+Add Package for Pickup** field changes to **Number of Packages for Pickup**. Use the pencil icon to change/edit the number of packages or package sizes.

5. Notes for the courier can be added about the pickup location with a 280 character limit.

6. Once all Pickup and Package details are entered, click **Submit to Courier** button and the pickup will be scheduled.

If scheduling a pickup is successful, the following will occur:

- A snackbar message is displayed showing the date and time for the pickup, and the Courier Pickup screen will close.
- An Order Activity message is written and displayed on the Order Activity tab of Order Summary.
- A CWEmailOut Courier Pickup Notification (CP) will be sent if configured.

If unsuccessful, an error displays such as the courier pickup cannot be scheduled. Edit the details and **Submit to Courier** again.

If there is an offline condition (that is, communications failure) or system error that is, system set-up issue) when the system submits to courier, an error message, Unable to schedule a pickup. Communication failure or Invalid Data passed. Contact your system administrator. is shown.

If a pickup has already been scheduled for the Return Authorization, upon selecting **Submit to Courier** the message a pickup already exists. Please cancel to exit is shown.

View the Courier Pickup Details

The **Courier Pickup Details** button is located on the *Returns/Refunds* tab of an order in Modern View when a courier pickup is already scheduled.

To view the courier pickup details:

1. Select the **Courier Pickup Details** drop-down list to select a specific unique Delivery ID to open the *Courier Pickup Details* screen. Here, you can review the Pickup Location, Drop-off Location, Current Status and History, Pickup Window, Package Details and Canceled Reason.

A Delivery ID's status changes to canceled when a scheduled courier service is canceled successfully before packages get picked up from the customer's address.

If packages get picked up by a courier service but are not delivered to the retailer and instead need to be returned back to the customer's address, the status will change to returned once the packages are delivered back to the customer. As an example, this may happen as a result of a drop-off location (store) being closed.

The *Order Activity* tab in Order Summary shows a line for each activity performed.

Cancel a Courier Pickup

Courier Pickup Details
Within the *Courier Pickup Details* screen, you can select **Cancel Courier Pickup** only when the status is either Pending or Enroute Pickup. Additionally, the Delivery ID must have received a successful response from CaR when retrieving the latest status.

If cancelation is successful, the following will occur:

- A snackbar message is displayed, and the Courier Pickup screen will close.
- An Order Activity messages will be written.
- A CWEmailOut Courier Pickup Notification (CP) will be sent if configured.

For a failed cancelation, the snackbar message, “Unable to cancel the courier pickup. Communication failure or Invalid Data passed. Contact your system administrator.” is shown. Select **Dismiss** to clear the pop-up message or select **Retry** to try again.

For more information:

- *Returns/Refunds* for an overview of the **Returns/Refunds** page.
- *Fields on Returns/Refunds* for a description of the fields on the **Returns/Refunds** page.

Fields on Returns/Refunds

Purpose: When you first advance to the **Returns/Refunds** page, return and refund activity displays in chronological order, with the most recent activity at the top of the page.

An activity status icon displays to the left of each transaction, indicating the transaction’s current status.

- Open: A star icon displays if the transaction is open.
- Held: An exclamation mark icon displays if the transaction is held.
- Processed: A check mark icon displays if the transaction is completed.
- Canceled: A circle with a line through it displays if the transaction is canceled.
- Written Off: A closed book icon displays if the transaction is in a written off status.

The following information displays on the **Returns/Refunds** page.

- *Returns/Refunds Page Title*
- *Refund Activity*

- *Overpayment Activity*
- *Balance Due Activity*
- *Exchange Activity*
- *Return Activity*

For more information:

- *Returns/Refunds* for an overview of the **Returns/Refunds** page.
- *Returns/Refunds Options* for step-by-step instructions on the actions you can perform on the **Returns/Refunds** page.

Returns/Refunds Page Title

- **Order** (*Order Number*)

Refund Activity

The following fields display for a refund associated with the order.

- *Refund Date* (unlabeled field in the **Refund** title)
- *Return Authorization Number* /*Refund Sequence Number*: This field is populated only if a return authorization caused the refund. If a Refund is not associated to a Return Authorization, the Refund Sequence Number is displayed.
- **Status** (*Refund Status*)
- *Invoice* **Number**
- **On Manual Hold** (*Refund On Hold*)
- **Hold Until** (*Refund Hold Until Date*)
- **Total** *Refund Amount*
  - *Net Exchange Billing*
  - *Original Payment Method*:
    - If the original payment method is credit card, the system displays the last four digits of the credit card.
    - If the original payment method is gift card, the system displays the last four digits of the gift card.
    - If the original payment method is check, the system displays the last four digits of the check number.
  - *Refund Type*

Overpayment Activity

The following fields display for an overpayment associated with the order.

- **Overpayment Date** (*Refund Date*; unlabeled field in the **Overpayment** title)
- *Return Authorization Number*: remove this field for overpayment since an RA is not created.
- **Status** (*Refund Status*)
- *Invoice* **Number**: This is the credit invoice generated for the refund.
- **On Manual Hold** (*Refund On Hold*)

- **Hold Until** (*Refund Hold Until Date*)
- **Total** *Refund Amount*
  - *Net Exchange Billing*
  - *Original Payment Method*:
    * If the original payment method is credit card, the system displays the last four digits of the credit card.
    * If the original payment method is gift card, the system displays the last four digits of the gift card.
    * If the original payment method is check, the system displays the last four digits of the check number.
  - *Refund Type*

Balance Due Activity

The following fields display for a balance due associated with the order.

- **Balance Due Date** (*Refund Date*; unlabeled field in the **Balance Due** title)
- *Return Authorization Number*
- **Status** (*Refund Status*)
- **On Manual Hold** (*Refund On Hold*)
- **Hold Until** (*Refund Hold Until Date*)
- **Total** *Refund Amount*
  - *Net Exchange Billing*
  - *Original Payment Method*:
    * If the original payment method is credit card, the system displays the last four digits of the credit card.
    * If the original payment method is gift card, the system displays the last four digits of the gift card.
    * If the original payment method is check, the system displays the last four digits of the check number.
  - *Refund Type*
  - *Check Number*

Exchange Activity

The following fields display for an exchange associated with the order.

- *Exchange Date* (unlabeled field in the **Exchange** title)
- *Return Authorization Number*
- **Status** (*Exchange Status*)
- *Return Disposition* (unlabeled field below **Status**)
- **Date Credited** (*Credited Date*)
- **Date Received** (*Received Date*)

- *Item Description* and *Item ID*: For each return authorization line, the system displays the following fields:
  - *SKU Description*: This field displays only if the item contains SKU's.
  - *Return/Exchange Reason*
  - **Quantity to Return** (*Return Quantity*)
  - **Quantity Received** (*Received Quantity*)
  - **Quantity Credited** (*Credited Quantity*)
  - *Replacement Item*
  - *Net Exchange Billing*
  - *Replacement Quantity*

Return Activity

The following fields display for a return associated with the order.

- *Return Date* (unlabeled field in the **Return** title)
- *Return Authorization Number*/*Refund Sequence Number*
- **Status** (*Return Status*)
- *Return Disposition* (unlabeled field below the **Return Status**)
- **Date Credited** (*Credited Date*)
- **Date Received** (*Received Date*)
- *Item Description* and *Item ID*: For each return authorization line, the system displays the following fields:
  - *SKU Description*: This field displays only if the item contains SKU's.
  - *Return/Exchange Reason*
  - **Quantity To Return** (*Return Quantity*)
  - **Quantity Received** (*Received Quantity*)
  - **Quantity Credited** (*Credited Quantity*)

Courier Pickup for Return Authorization XXXXX

This window opens after selecting *Schedule Courier Pickup* on the *Returns/Refunds* tab of *Order Summary*. The unique *Return Authorization Number* is displayed on the title banner.

Pickup Details The following fields are pre-populated based on the order ship-to details for the original order. Use the **Edit** button to change any of the pickup details.

- **Pickup Contact Name** Includes prefix, first name, middle initial, last name, suffix and company.
- **Address** Includes all address lines, city, state, zip, country, apartment.
- **Phone Number** Displays a single phone number based on the following hierarchy from the order ship to and then if edited, display the updated information
  - Hierarchy: (1) Home, (2) Business, (3) Mobile (or Fax). One-Time Ship-To only has a single phone number.

- **E-mail Address** Defaults the email from the order ship-to on the original order.

The **Select Pickup Window** and **Package Details** section do not display until a Time Zone has been selected.

Select Pickup Window Displays the current local pickup time for the time zone selected.

- **Day** The system presents four available dates for pickup in the drop-down list.
- **Time**
  - Pickup windows in the drop-down list are predefined
    - 8:00AM - 10:00 AM
    - 10:00 AM - 12:00 PM
    - 12:00 PM - 2:00 PM
    - 2:00 PM - 4:00 PM
    - 4:00 PM - 6:00 PM

  Display of the earliest pickup window for the current day will be determined by evaluating which is the pickup window nearest the drop-off location's current local time, but with no part of the window in the past. Examples:
  - If the local time is 10:05 AM, the list of pickup window options should start at 12:00PM - 2:00PM
  - If the local time 5:00 PM, and the pre-defined pickup windows end at 6:00 PM, then do not display the current date as an option for selection. Display the next 4 days and pickup windows.
- **Store Hours** Store hours shown as display only, or store hours not found message is shown.
- **Courier Dropoff Location** Store location name and the distance from the pickup location to the drop off location is shown for display only.

Package Details

- **Notes for the Courier** 280 character limit text field to leave a note for the courier pickup.
- **+Add Packages for Pickup** Opens the *Packages for Pickup Drawer* to detail the package requirements.

Courier Pickup Details XXXXX

This window opens after selecting *Courier Pickup Details* on the *Returns/Refunds* tab of *Order Summary*. This option is shown on every Return Card that has an associated Courier Pickup in any status. All Delivery ID's associated with the Return Authorization are shown with the most recent at the top. The Delivery ID must be unique across all of the retailer applications. OMS generates this ID like OMS-R-<RA reference id>-<count>. On selection of a Delivery ID from within the 'Courier Pickup Details' menu, the Courier Pickup Details window is shown containing the following information.
Pickup Created Date The date will reflect the date the pickup was created/submitted.

- **Pickup** Includes contact data such as prefix, first name, middle initial, last name, suffix and company, the address details, phone number. and email address.
- **Dropoff** Displays the Store Location Name and Location Code and address data including all address lines, city, state, zip, country, apartment, and a phone number.
- **Status** Display most recent status.

- *Status History* Clickable text.
- **Items** Displays count of items on the associated Return Authorization.
- **Packages** Displays count of packages sent to the Courier.

The lower section of the screen presents in a card and is split out into 3 sub-sections:

Pickup Details A time zone for the pickup location date and a pickup window time slot for when the customer's package will be picked up. Shown in local time. Package Details is a hyperlink to open the Package Details drawer. This shows the number and type of items in the package from a pre-defined size:

- Small (Can be carried with one hand)
- Medium (Can be carried in a shopping bag)
- Large (Needs two hands to carry)

The number of packages in total and the dimensions such as the weight, height, length, and width.

Courier Information Shows the name of the courier, a hyperlink for the Courier Tracking URL that opens to the courier website, and any notes specific for the courier.

Undeliverable Details The courier undeliverable reason such as Unfulfilled or whether the items were left at the door.

A "Cancel Courier Pickup" button shows in the lower right of the card.

Status History Drawer

Status History is a clickable link to open the **Status History Drawer**. The **Status History Drawer** displays a record of each status the order has been in since creation. The most recent status is displayed at the top of the list. It shows:

- **Status** Pickup Pending, Pickup Complete, Enroute to Dropoff.
- Date and local time when the order was updated to the corresponding status.

Click **Done** to close the drawer.

If, on entry to the **Courier Pickup Details** page, the call to CaR fails or returns no data, the following message is shown on the Status History window: No data to display.

Packages for Pickup Drawer

This drawer opens after selecting **+Add Package for Pickup** and contains the number of packages for pickup and the package size for each package. Select **Done** to close the drawer.

- **Number of Packages for Pickup**

  A default value of 1 but this can be changed by entering another number or using the arrows. This number cannot be greater than the quantity of units on the Return Authorization.
- **Package Size** Each Package <#> field will be in numerical order beginning with 1. Selecting this field, shows a pre-defined list of sizes.

58 Messages

Overview: Use the **Messages** page to review, add, and update order notes as well as messages for each ship-to customer on the order.

Order notes: Order notes are messages that are flagged to print nowhere. These are notes that are not shared with the customer. You use the *Order Notes (apply to entire order)* window to enter or update order notes.

The system also writes order notes. For example, order notes are written for activity related to Order Orchestration such as the originating store, and the request ID assigned in Order Orchestration.

Message types: In addition to order notes, you can work with the following types of messages for an order ship-to:

- Gift messages
- Pick slip messages
- Quote form messages
- Refund check messages

How to display: Select the **Messages** option on the *Order Entry*, *Order Summary*, *Order Activity*, *Returns/Refunds*, or *Invoices* page.

> **Note:**
>
> You can add and edit messages and order notes regardless of whether the order is locked.

In this topic:

- *About Default Messages*
  - *Defining Default Messages*
  - *Selecting a Default Message to Add to an Order*
  - *Default Message Examples*

For more information:

- *Messages Options* for step-by-step instructions on the actions you can perform on the **Messages** page.
- *Fields on Messages* for a description of the fields on the **Messages** page.
- *Order Line Message* for information on working with order line messages.
- *Messages Window* for information on working with order notes or customer messages in order entry.

About Default Messages

Purpose: Default messages are standard order or gift messages that you enter on orders on a regular basis. Instead of requiring users to retype a standard message on each eligible order, you can have the user select the message from a list of standard messages to default to the order, allowing you to avoid typographical errors that can occur when the message is manually added to the order.

Defining Default Messages

You can create default messages for order level messages and line level messages using the **Work with Default Messages (WMSG)** menu option.

The **Message Type** defined for the default message indicates whether the default message text is used for order level messages or order line level messages.

The **Print Code** defined for the default message indicates where the default message displays.

Valid values for order level messages:

- **Ref Chk Cust** = The default message prints on a refund check. You can review and define refund check messages on the **Messages** page.
- **Gift Message** = The default message prints as a gift message on the pick slip. You can review and define gift messages on the **Messages** page.
- **Nowhere** = The default message does not print anywhere but displays on the order. You can review and define order messages on the **Messages** page under the **Order Notes** heading.
- **Picks** = The default message prints on the pick slip. You can review and define pick slip messages on the **Messages** page.
- **Quotes** = The default message prints on the quote form. You can review and define quote form messages on the **Messages** page.
- **Both** = The default message prints on both the pick slip and invoice.
- **Invoices** = The default message prints on the invoice.
- **Ref Chk Int** = The default message prints in a detachable area of the refund check that is not visible to the customer.
- **User Defined** = The default message prints on a document defined by the user, such as a custom pick slip.

> **Note:**
>
> Contact Center does not use the **Both**, **Invoices**, **Ref Chk Int**, and **User Defined** order level message types.

Valid values for order line level messages:

- **Nowhere** = The default message does not print anywhere but displays on the order line.
- **Both** = The default message prints on both the pick slip and invoice.

- **Invoices** = The default message prints on the invoice.
- **Picks** = The default message prints on the pick slip.

Selecting a Default Message to Add to an Order

The **Message Template** field at a message window in Contact Center allows you to select a default message to add to an order.

When a user selects a default message to add to an order, the message text defined for the default message defaults to the **Message** field; however, you can still override the default message text or add to the default message text. For example, if a user selects to default `Happy Birthday`, the user may wish to modify the message line to read `Happy Birthday, Mom! Love, Mary and John`.

You can also define and use default message templates for order notes and for order lines. See *Order Note* or *Order Line Message* for background.

Default Message Examples

An example of the type of messages you may wish to default are listed below.

- Happy Birthday
- Happy Anniversary
- Congratulations
- Merry Christmas
- Happy Holidays
- Season's Greetings
- Best Wishes
- Thinking of You
- With Deepest Sympathy
- Use discount code PR5 to receive 5% off your next order.

Messages Options

Purpose: You can perform the following actions on the **Messages** page.

- *Review Order Notes*
- *Add an Order Note*
- *Update an Order Note*
- *Delete an Order Note*
- *Review Messages for a Ship-to Customer*
- *Add a Gift, Pick Slip, Quote Form, or Refund Check Message*
- *Update a Message*
- *Delete a Message*
- *Review Order Summary*
- *Review Order Activity*

- *Review Refunds and Returns for the Order*
- *Review Invoices for the Order*
- *Unlock the Order*

For more information:

- *Messages* for an overview of the **Messages** page.
- *Fields on Messages* for a description of the fields on the **Messages** page.

Review Order Notes

Order Notes are listed under the Order Note heading. These are messages added through the *Order Notes (apply to entire order)* window. These messages are for internal users and not exposed to the customer.

See *Order Notes Fields* for details.

Add an Order Note

Select the **Add Note** option under the Order Notes heading to open the *Order Notes (apply to entire order)* window.

1. Optionally, select a **Message Template**. Message templates are defined in the Work with Default Messages (WMSG) option in Classic View. Only templates with a **Type** of **Order Message** and a **Print Code** of **Nowhere** are available to select for order notes.
2. Define the contents of the message in the **New Message** (*Order Message*) field to suit your needs. You can use a carriage return to enter more than one message lines. Your entry cannot exceed 100 positions total. If your entry exceeds 60 positions, the system splits it into two separate order notes.
3. Select **OK** to create the note. The system returns you to the previous page.

Update an Order Note

1. Select the options icon (⋮) next to an existing order note select **Edit** to open the *Order Notes (apply to entire order)* window.
2. Optionally, change the Message Template, the New Message, or both. Your entry cannot exceed 60 positions.
3. Select **OK** to update the note. The system returns you to the previous page.

> **Note:**
>
> If you enter message text in the **New Message** field and then select a message template from the **Message Template** field, the system replaces any text that you entered in the **New Message** field with the default message text defined for the selected message template.

Delete an Order Note

Select the options icon (⋮) next to an existing order note and select **Delete**. The note is deleted immediately.

Review Messages for a Ship-to Customer

For each ship-to customer, you can review the following messages:

- Gift messages
- Pick Slip Messages
- Quote Form Messages
- Refund Check Messages

Add a Gift, Pick Slip, Quote Form, or Refund Check Message

Current order and single ship-to only: The messages that you enter on this window apply to the current order only and not any other order for the customer. If the order contains more than one ship-to, the system adds the messages to the selected order ship-to.

Order-level only: These order messages apply to the order and specified ship-to, and not to a specific item on the order.

Steps to add a message for a ship-to customer on an order:

1. Select the + sign next to the Add Message option to open the *Messages For Window*. The window title indicates the customer name and ship-to, for example: Messages for SAMPLE CUSTOMER (Ship-To 1).
2. Select a Message Type of Gift, Pick Slip, Quote Form, or Refund Check.
3. Optionally, select a **Message Template** to default the text from the template into the **New Message** field. Message templates are defined in the Work with Default Messages (WMSG) option in Classic View. Only templates with a **Type** that matches the selected **Message Type** are available to select.
4. Enter the **New Message**, or optionally edit the text that defaulted from the **Message Template**. You can use a carriage return to enter more than one message lines. Your entry cannot exceed 100 positions total. If your entry exceeds 60 positions, the system splits it into two separate messages.
5. Select **OK** to create the message. The system returns you to the previous page.

Update a Message

1. Select the options icon (⋮) next to an existing message and select **Edit**.
2. Optionally, change the **Message Template**, the **New Message**, or both. You can use a carriage return to enter more than one message lines. Your entry cannot exceed 100 positions total. If your entry exceeds 60 positions, the system splits it into two separate messages.
3. Select **OK** to update the message. The system returns you to the previous page.

> **Note:**
>
> You must have authority to the *Modify Existing Messages (A30)* secured feature in order to update a message.

Delete a Message

Select the options icon (⋮) next to an existing message and select **Delete**. The message is deleted immediately.

> **Note:**
>
> In order to delete a message, you must have authority to the *Modify Existing Messages (A30)* secured feature.

Review Order Summary

Select the **Order Summary** tab to advance to the *Order Summary* page for the current order.

Review Order Activity

Select the **Order Activity** tab to advance to the *Order Activity* page for the current order.

Review Refunds and Returns for the Order

Select the **Returns/Refunds** tab to advance to *Returns/Refunds* page.

Review Invoices for the Order

Select the **Invoices** tab to advance to the *Invoices* page.

Unlock the Order

If the order is currently locked, select **Unlock Order** or press CTRL + ALT + u to process any remaining order updates and unlock the order so that it available for maintenance by another user.

> **Note:**
>
> This option is available only if you have locked the order in the current session; it is not available if another user has locked the order. If you have the required authority, you can use the *Unlock Order* page to unlock an order locked by another user.,

For more information: See *Maintaining an Order* for more information about locking and unlocking an order.

Fields on Messages

Purpose: The following information displays on the **Messages** page.

- *Messages Page Title*
- *Order Notes Fields*

- *Messages Fields*

For more information:

- *Messages* for an overview of the **Messages** page.
- *Messages Options* for step-by-step instructions on the actions you can perform on the **Messages** page.

Messages Page Title

- **Order #** (*Order Number*)

Order Notes Fields

- *Message Type*: Set to **Order Note**.
- Message: The contents of the note. If the note exceeds 60 positions, the system automatically splits the notes into two notes.
- Date (*Message Date*): Date and time when the note was created or most recently updated.
- User (*Message User*): The ID of the user who most created or most recently updated the note.

Messages Fields

For each ship-to on the order:

- *Customer Name*
- Order *Ship-To Number*
- *Message Type*: Set to Gift, Pick Slip, Quote Form, or Refund Check.
- Message: The contents of the message. If the original message exceeds 60 positions, the system automatically splits the message into two records.
- Date (*Message Date*): Date and time when the message was created or most recently updated.
- User (*Message User*): The ID of the user who most created or most recently updated the message.

59 Messages Window

Overview: Use the **Message** window to add or update a:

- Gift or pick slip message for an order you are entering in order entry.
- Gift, pick slip, quote form, or refund check message for an existing order.

Current order and ship-to only: The messages that you enter on this window apply to the current order and the messages are stored with each individual ship-to, as indicated in the window title, for example: Messages for SAMPLE CUSTOMER is displayed in Order Entry after you have selected the customer for the order and have advanced to adding items to the order. When you open this window from the *Messages* page, an example of the window title is Messages for SAMPLE CUSTOMER (Ship-To 1).

Order-level only: These order messages apply to the order and not to a specific item on the order. See *Order Line Message* for more information on order line messages.

How to display:

- **Adding a message:**

Entering a new order: Select the **+ Add Message** option for Messages at the *Messages* window in Order Entry. In this case, the window title is Messages for SAMPLE CUSTOMER where SAMPLE CUSTOMER is the customer name.

Existing order: Select the + **Add Order Message** option on the *Messages* page for the ship-to customer. In this case, the window title is Messages for SAMPLE CUSTOMER (Ship-To 1) where SAMPLE CUSTOMER is the customer name and 1 is the order ship-to number.

> **Note:**
>
> You can add a message for an existing order regardless of whether the order is locked.

- **Updating a message:** On the *Messages* page, or at the Messages window in order entry, select the options icon (⋮) next to an existing message and select **Edit**.

For more information:

- *Message Window Options* for step-by-step instructions on the actions you can perform on the **Messages** window.
- *Fields on Message Window* for a description of the fields on the **Messages** window.

Message Window Options

Purpose: Use the **Message** window to add or update a message related to the current order and ship-to.

- *Add a Message*

- *Update a Message*

For more information:

- *Messages Window* for an overview of the **Messages** window.
- *Fields on Message Window* for a description of the fields on the **Messages** window.

Add a Message

1. Select a **Message Type**.

   Available message types:

   - In order entry, the only available messages types are Gift and Pick Slip.
   - From the *Messages* page, the available message types also include Quote Form and Refund Check.

2. Optionally, select a message template from the **Message Template** (*Order Message Template*) field. When you select a message template, the message text defined for the template defaults to the **Message** field. You can override the default text to suit your needs. For example, if you select to default `Happy Birthday`, you may wish to modify the message text to read `Happy Birthday, Mom!`.

   - If you are creating a gift message, the system displays only default message text whose **Print Code** is **Gift Message**.
   - If you are creating a pick slip message, the system displays only default message text whose **Print Code** is **Picks**.
   - The following template options are available only when you open this window from the *Messages* page. They are not available in order entry.
   - If you are creating a quote form message, the system displays only default message text whose **Print Code** is **Quotes**.
   - If you are creating a refund check message, the system displays only default message text whose **Print Code** is **Ref Chk Cust** (Refund Check Customer).

   You can select a message template for an order line only if one or more templates have been defined in Classic View (WMSG).

3. Define the contents of the message in the *Message* field to suit your needs. You can use a carriage return to enter as many message lines as you need. Your entry cannot exceed 100 positions total. If your entry exceeds 60 positions, the system splits it into two separate message records. If necessary, use a carriage return to separate the lines.

4. Select **OK** to create the message. The new message is saved against the specified ship-to if using multiple ship-to functionality. You return to the previous page.

You can review messages for an order, as well as order notes, on the *Messages* page. The system displays the date and time when the message was created and the user ID of the user that created the message, as well as the message type and text. You can also update order messages on this page. Note:

- If you enter message text in the **New Message** field and then select a message template from the **Message Template** field, the system replaces any text that you entered in the **New Message** field with the default message text defined for the selected message template.

- If you enter a carriage return without entering any text for that message line, the system will create an empty message line.

Example: If you enter:

- `Happy Birthday!`
- `Love, Mary and John`

The system will create the following message lines:

- message line 1: `Happy Birthday!`
- message line 2:
- message line 3: `Love, Mary and John`

Update a Message

1. Optionally, select a **Message Template** (*Order Message Template*) field or change the selected template.

   Note: Changing the message template clears the contents of the **New Message** field.
2. Optionally, change the contents of the **New Message** field.
3. Select **OK** to update the message. The changed message is saved against the specified ship-to if using multiple ship-to functionality. You return to the previous page.

Fields on Message Window

Purpose: The following information is on the **Messages** window.

- *Message Type*
- **Message Template** (*Order Message Template*)
  - For order messages, the system displays only default message text whose **Print Code** is **Nowhere**.
  - For gift messages, the system displays only default message text whose **Print Code** is **Gift Message**.

  The following template options are available only when you open this window from the *Messages* page. They are not available in order entry.
  - For pick slip messages, the system displays only default message text whose **Print Code** is **Picks**.
  - For quote form messages, the system displays only default message text whose **Print Code** is **Quotes**.
  - For refund check messages, the system displays only default message text whose **Print Code** is **Ref Chk Cust** (Refund Check Customer).
  - For order line messages, the system displays all order line message templates regardless of the **Print Code** setting.
- **New Message** (*Order Message*)

For more information:

- *Messages Window* for an overview of the **Messages** window.
- *Message Window Options* for step-by-step instructions on the actions you can perform on the **Message** window.

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Order Notes

Overview: Use the **Order Notes (apply to entire order)**window to add or update an order note that is not displayed to the customer.

Defining order note templates: Use the Work with Default Messages (WMSG) option in Classic View to define order note templates. Only templates with a **Type** of **Order Message** and a **Print Code** of **Nowhere** can be assigned to order notes.

Current order only: The notes that you enter on this window apply to the current order only and not any other order for the customer. If the order contains more than one ship-to, messages are stored with each individual ship-to.

Order-level only: These order messages apply to the order and not to a specific item on the order. Order notes show regardless of which ship-to you are on when opening the Messages window. All order notes stay with the order and are not removed when a ship-to is deleted.

How to display:

- Add a note: Select the plus sign (+) next to **Order Notes (apply to entire order)**option in the *Messages* window in Order Entry or at the *Messages* tab at the Order Summary. For multiple ship-to's, Messages is only shown when you are on the Ship-To Details view (and not Ship-To Items) for a specific ship-to.
- Edit a note: Use the options icon (⋮) next to an existing order note in the *Messages* window in Order Entry or at the *Messages* tab at the Order Summary and select **Edit**.

> **Note:**
>
> You can add a message regardless of whether the order is locked.

For more information: See:

- *Order Notes Options* for information on the steps you use to add or update an order note.
- *Fields on Order Notes* for information on the fields displayed in the Order Notes window.

Order Notes Options

Purpose: You can perform the following actions on an **Order Notes** window.

- *Add an Order Note*
- *Edit an Order Note*
- *Delete an Order Note*

For more information:

- *Order Notes* for an overview of the **Order Notes** window.
- *Fields on Order Notes* for a description of the fields on the **Order Notes** window.

Add an Order Note

1. Optionally, select a **Message Template**. Message templates are defined in the Work with Default Messages (WMSG) option in Classic View. Only templates with a **Type** of **Order Message** and a **Print Code** of **Nowhere** are available to select for order notes.
2. Define the contents of the message in the **New Message** (*Order Message*) field to suit your needs. You can use a carriage return to enter more than one message lines. Your entry cannot exceed 100 positions total. If your entry exceeds 60 positions, the system splits it into two separate order notes.
3. Select **OK**. The new note is saved against the order. The system returns you to the previous page.

Edit an Order Note

1. To select an order note to edit, use the options icon (⋮) next to an existing order note in the Messages window in Order Entry or at the *Messages* tab at the Order Summary and select **Edit** to open the **Order Notes** window.
2. Optionally, change the Message Template, the New Message, or both. Your entry cannot exceed 100 positions total. If your entry exceeds 60 positions, the system splits it into two separate order notes.
3. Click **OK**. The changed note is saved against the order. The system returns you to the previous page.

> **Note:**
>
> If you enter message text in the **New Message** field and then select a message template from the **Message Template** field, the system replaces any text that you entered in the **New Message** field with the default message text defined for the selected message template.

Delete an Order Note

Select the options icon (⋮) next to an existing order note and select **Delete**. The note is deleted immediately.

Fields on Order Note

Purpose: The following information displays on the **Order Note** window.

- **Message Template** (*Order Message Template*): For order messages, the system displays only default message text whose **Print Code** is **Nowhere**.
- **New Message** (*Order Message*)

For more information:

- *Order Note* for an overview of the **Add Message** window.
- *Order Note Options* for step-by-step instructions on the actions you can perform on the **Order Note** window.

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Invoices

Purpose: Use the **Invoices** page to review the invoices for an order. This page lists the invoices and credits the system has generated for the order you are reviewing and provides access to the details of each invoice.

The system creates a separate invoice for each shipment made against an order. In addition, the system creates a credit invoice each time a return, cancellation, or overpayment is made against the order.

Invoice creation for ship-for-pickup orders: If the *Invoice for Ship For Pickup Order Once Intransit* system control value is selected, the invoice is created for an item on a ship-for-pickup order once the system receives notification from Order Broker that the order line is in transit from the sourcing location to the pickup location, has been received at the pickup location, or has been fulfilled. See that system control value for more information.

How to display: Select the **Invoices** option on the *Order Summary*, *Order Activity*, *Messages*, or *Returns/Refunds* page.

Invoices first display on this page in descending invoice date, ascending invoice number sequence.

In this topic:

- *Consolidated Invoice?*

For more information:

- *Invoices Options* for step-by-step instructions on the actions you can perform on the **Invoices** page.
- *Fields on Invoices* for a description of the fields on the **Invoices** page.

Consolidated Invoice?

The *Consolidated Invoice (B49)* system control value indicates whether to consolidate multiple shipments for an order on the same system date under the same Invoice Header number.

The *Invoice Consolidation Method (E29)* controls whether the system consolidates invoices for each separate ship-to for an order, or for the order as a whole:

- **ORDER** = Consolidate shipments on the same system date for all order ship-to addresses onto the same invoice.
- **ORDER SHIP** = Consolidate shipments on the same system date onto the same invoice only if the shipments are for the same order ship-to address.

Invoice consolidation does not apply when you express-bill an order or create a credit invoice.

Also, if a billing or shipping address changes between shipments and the *Capture Addresses for Invoice (J24)* system control value is selected, this can prevent the invoice from consolidating. Even if the invoice is consolidated, there is a separate entry at this page for each unique billing address/shipping address combination if the *Capture Addresses for Invoice (J24)* system control value is selected.

> **Note:**
>
> In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

Invoices Options

Purpose: You can perform the following actions on the **Invoices** page.

Invoice Actions:

- *Print an Order Receipt*
- *Select an Invoice for Review*
- *Sort Invoices*
- *Filter Invoices*

Order Actions:

- *Perform a New Search*
- *Review Order Summary*
- *Review Order Activity*
- *Review or Work with Order Messages or Order Notes*
- *Review Refunds and Returns for the Order*
- *Unlock the Order*

For more information:

- *Invoices* for an overview of the **Invoices** page.
- *Fields on Invoices* for a description of the fields on the **Invoices** page.

Print an Order Receipt

The order receipt provides a single view of the shipments that have taken place for an order ship-to. The receipt does not list any activities that have reduced order totals, such as a return, an item entered with a negative quantity, or a credit applied after shipment; however, the current order totals listed on the receipt reflect these activities if they have occurred.

Select **Print Order Receipt**. The system displays a message indicating the order receipt has been printed. The Order Receipt is available to review and print on the **Document Management (My Docs)** screen in the Classic View of Order Administration.

- This option is available only if the *Order Receipt Print Program (L46)* system control value specifies a program and there are debit invoices currently displayed on the screen. The standard graphical program for printing order receipts is **ORDERRECG**. The standard non-graphical program for printing order receipts is **ORDERREC**.
- Selecting this option for a multi-recipient order generates a receipt for each ship-to that has had any shipments.

Select an Invoice for Review

Select an *Invoice* link to advance to the *Invoice* page.

> **Note:**
>
> You can have an **Invoice** page open for each invoice associated with an order.

Sort Invoices

You can sort on any column in the **Invoices** table by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

Invoices first display on this page in descending invoice date, ascending invoice number sequence.

Filter Invoices

The *Invoices* page displays the first 15 invoice records for the order.

The page provides an entry field below the **Invoices** panel with the message **Type to filter**. You can further refine the invoices displayed in the *Invoices Table* by entering one or more search terms found in any of the fields displayed in that table.

Example: Enter `credit`. The displayed invoices include only those with a **Type** of credit. Next, enter the description of a payment method. Displayed results are now further restricted to invoices that are both credit invoices and that used the entered payment method.

Matching records need to contain the search term, but do not need to start with the search term. For example, both `123.45` and `23.45` are matches for a search term of `23`.

Filtering is across all results: The filtering is not restricted to the invoices displayed on the first page of results. For example, if the only invoice matching your entry is on the second page of results, this invoice is displayed.

Additional information on filtering:

- Only fields displayed at the *Invoices Table* are available for filtering. For example, you cannot filter based on the item number that was billed.
- Filtering is not case-sensitive. For example, you can enter `credit` or `CREDIT` to display credit invoices.
- To filter based on invoice date, include the date delimiters. For example, enter 8/27 rather than 827 to filter for an invoice that billed on August 27.

- You can filter based on numeric fields to display partial matches. For example, if you enter 123, all invoices that include 123 in the invoice number, invoice total, or last four positions of the payment method are included in the search results.

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.

Perform a New Search

In the page title banner, select the **New Search** option to advance to the *Search for Orders or Customers* page. The system clears all of the fields on this page so that you can enter new search criteria and perform a new search.

Review Order Summary

Select **Order Summary** at the top of the page to advance to the *Order Summary* page for the current order.

Review Order Activity

Select **Order Activity** at the top of the page to advance to the *Order Activity* page for the current order.

Review or Work with Order Messages or Order Notes

Select **Message** at the top of the page to advance to the *Messages* page for the current order.

Review Refunds and Returns for the Order

Select **Returns/Refunds** at the top of the page to advance to *Returns/Refunds* page.

Unlock the Order

Select **Unlock Order** or press CTRL + ALT + u to process any remaining order updates and unlock the order so that it available for maintenance by another user.

> **Note:**
>
> This option displays only if you have locked the order in the current session; it does not display if another user has locked the order. In this case, you can use the *Unlock Order* option if you have the required authority.

For more information: See *Maintaining an Order* for more information about locking and unlocking an order.

Fields on Invoices

Purpose: The following information displays on the **Invoices** page.

- *Invoices Page Title*
- *Invoices Table*

For more information:

- *Invoices* for an overview of the **Invoices** page.

- *Invoices Options* for step-by-step instructions on the actions you can perform on the **Invoices** page.

Invoices Page Title

- **Order** (*Order Number*): This is the order number whose invoices you are reviewing.

Invoices Table

The **Invoices** table lists the first 500 invoices associated with the order.

Invoices first display in this table in descending invoice date, ascending invoice number sequence.

- *Invoice* **Number**: Select the **Invoice Number** link to advance to the *Invoice* page.
- *Invoice Date*
- **Ship-To**: This is the order ship-to number associated with the invoice. If an invoice is associated with more than one ship-to number, each ship to number displays, separated by a comma. For example: `1, 3`.
- **Items**: This is the total number of order lines for the invoice, across all order ship-tos associated with the invoice.
- **Type** (*Invoice Type*):
  - `Credit` displays if the invoice was created as a result of a return, cancellation, or overpayment is made against the order.
  - `Invoice` displays if the invoice was created as a result of a shipment made against the order.
  - `(Net)` displays after the invoice type if the invoice is currently pending *Credit Card Net Exchange Billing*; for example: `Invoice (Net)` or `Credit (Net)`. The system considers an invoice pending for credit card net exchange billing if the Invoice Payment Method record contains the **EXC** flexible payment option code in the **IPM FPO Payment Code** and the invoice has not yet been deposited (the **IPM Deposit created date** is blank).
- *Invoice Total*. An icon ( ) Indicates if the invoice is pending credit card net exchange billing.
- *Payment Method*

If the payment method is a card, the last four digits of the card displays after the payment type description; for example: `VISA (1111)`.

If the payment method is check, the check number displays after the payment type description; for example: `CHECK (12345)`.

`Multiple Payment Methods` displays if the invoice is associated with multiple payment methods.

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Invoice

Overview: Use the **Invoice** page to review the details for an invoice.

As you build an order, the system keeps a record of each shipment you make against the order. Similarly, the system creates a record of each credit against the order for returns, cancellations, and overpayments.

The system creates a separate invoice for each shipment made against an order. In addition, the system creates a credit invoice each time a return, cancellation, or overpayment is made against the order.

How to display: Select an **Invoice Number** link on the *Invoices* page.

For more information:

- *Invoice Options* for step-by-step instructions on the actions you can perform on the **Invoice** page.
- *Fields on Invoice* for a description of the fields on the **Invoice** page.

Invoice Options

Purpose: You can perform the following actions on the **Invoice** page.

Customer Actions:

- *Call the Customer's Phone Number*
- *Email the Customer*

Invoice Line Actions:

- *Review an Item's Personalization Details*

Payment Method Actions:

- *View Payment Method Details*

Order Actions:

- *Perform a New Search*
- *Review Order Summary*
- *Review Order Activity*
- *Review or Work with Order Messages or Order Notes*
- *Review Refunds and Returns for the Order*
- *Review Invoices for the Order*
- *Unlock the Order*

For more information:

- *Invoice* for an overview of the **Invoice** page.

- *Fields on Invoice* for a description of the fields on the **Invoice** page.

Call the Customer's Phone Number

Select a *Phone Number* link to advance to the default application used to initiate phone calls. If a default application is not defined, a window displays where you can select the application to use to call the customer's phone number.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Phone** field in the **Work with Contact Center (WWCC)** menu option. In addition, the **Phone** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Email the Customer

Select the *Email Address* link to advance to the default application used for email. If a default application is not defined, a window displays where you can select the application to use to email the customer.

> **Note:**
>
> This option is available only if hyperlink configuration is selected for the **Email** field in the **Work with Contact Center (WWCC)** menu option.

Review an Item's Personalization Details

Select the *Personalization (Special Handling)* link for an item to advance to the *Personalization Information* window.

> **Note:**
>
> This option is available only if personalization has been defined for the item.

View Payment Method Details

Select the **View Details** icon for a payment to advance to the *Payment Method Details* window.

Perform a New Search

Select **Search** or **Home** above the page to advance to the *Search for Orders or Customers* page.

Review Order Summary

Select **Order Summary** at the top of the page to advance to the *Order Summary* page for the current order.

Review Order Activity

Select **Order Activity** at the top of the page to advance to the *Order Activity* page for the current order.

Review or Work with Order Messages or Order Notes

Select **Message** at the top of the page to advance to the *Messages* page for the current order.

Review Refunds and Returns for the Order

Select **Returns/Refunds** at the top of the page to advance to *Returns/Refunds* page.

Review Invoices for the Order

Select **Invoices** at the top of the page to return to the *Invoices* page.

Unlock the Order

Select **Unlock Order** above the page or press CTRL + ALT + u to process any remaining order updates and unlock the order so that it available for maintenance by another user.

> **Note:**
>
> This option displays only if you have locked the order in the current session; it does not display if another user has locked the order. In this case, you can use the *Unlock Order* option if you have the required authority.

For more information: See *Maintaining an Order* for more information about locking and unlocking an order.

Fields on Invoice

Purpose: The following information displays on the **Invoice** page.

- *Invoice Page Title*
- *Invoice Billing Address Panel*
- *Invoice Totals Panel*
- *Ship-To Details Panel*
  - *Ship-To Address Panel*
  - *# Order Lines In This Invoice Panel*
- *Invoice Payment Information Panel*

For more information:

- *Invoice* for an overview of the **Invoice** page.
- *Invoice Options* for step-by-step instructions on the actions you can perform on the **Invoice** page.

Invoice Page Title

- **Order** (*Order Number*): This is the order number whose invoices you are reviewing.
- *Invoice*: This is the invoice number whose details you are reviewing.

Invoice Billing Address Panel

The **Invoice Billing Address** panel displays the name and address of the customer charged for the invoice.

- If the *Capture Addresses for Invoice (J24)* system control value is selected, the invoice billing address is the name and address from the Invoice Address table where the **Type** is set to **B**.
- If the *Capture Addresses for Invoice (J24)* system control value is unselected, the invoice billing address is the name and address from the Customer Bill To table, if there is a bill-to account associated with the order; otherwise, the name and address of the Customer Sold To who placed the order.

The **Invoice Billing Address** panel displays the following fields:

- **Bill-To** *Customer Name* (unlabeled field below the **Invoice Billing Address** title): The customer name displays in prefix, first name, middle initial, and last name format.
  – If a *Company Name* is also defined, the company name displays below the sold-to customer name.
  – If a *Company Name* is defined without a sold-to customer name, the company name displays in place of the sold-to customer name.
- **Bill-To** *Customer Address* (unlabeled field below the **Customer Name** and **Company Name**)
- **Bill-To** *Phone Number* (unlabeled fields below the **Address**): Up to three phone numbers may be shown with the type shown in brackets such as (508) 652–3800 (Business). If more than one phone number is defined for the sold-to customer and only one is shown such as in a one-time ship-to order, the system uses the following hierarchy to display the phone number:
  – home phone number
  – business phone number that also supports a phone extension
  – mobile or fax phone number as determined by Third Phone Number Type (L53) system control value.

The phone number displays in the telephone number format defined for the country on the customer's address.

> **Note:**
>
> The **Phone Number** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

- **Bill-To** *Email Address* (unlabeled field below the **Phone Number**): This is the bill-to customer's primary email address.

- **Bill-To** *Opt-In Status* (unlabeled field below the **Email Address**): This is the opt-in status defined for the bill-to customer's primary email address.
- *Gross Margin* amount and percentage. Displayed if you have authority under the *Display Gross Margin (A65)* secured feature.
- *Currency Code* related to the Gross Margin.
- *Hidden Shipping*. Displayed only if there is hidden freight on the invoice.
- *Discount Amount*. May be 0.00.
- Delivery Code (*Delivery Address Type*)

Invoice Totals Panel

The **Invoice Totals** panel displays the payment totals for the invoice and also indicates whether the invoice is currently pending *Credit Card Net Exchange Billing*.

- *Merchandise*
- *Shipping*: This amount may not be equal to the total of all the line-level freight charges. An icon ( ) Indicates if there is a shipping override applied to the order, even if it was applied after the creation of this invoice.
- *Additional Shipping*
- *Additional Charges*
- *Personalization (Special Handling) Charge*
- *Tax*: The total tax for the invoice. This total includes GST and PST, if any. This field does not include hidden tax.
- *GST*: Total for this invoice.
- *PST*: Total for this invoice.
- **Total** (*Invoice Total*)
- *Currency Code* that applies to the invoice totals.
- *Net Exchange Billing*: `Net Exchange Billing` displays if the invoice is currently pending credit card net exchange billing.
- **Netted Against**: Provides links to the other invoices associated with the order that are also pending credit card net exchange billing, if any.

Ship-To Details Panel

The **Ship-To Details** panel displays the details for a ship-to on the invoice, including the ship-to order's name and address, and the items assigned to the ship-to order.

Select the arrow next to a **Ship-To Details** panel to view or hide the order ship-to information.

- If there is more than one ship-to on the order, all **Ship-To Details** panels are collapsed by default.
- If there in only one ship-to on the order, the **Ship-To Details** panel is expanded by default.

Ship-To Details Panel Title

The title of this panel varies, depending on the setting of the *Broker Delivery Type*:

- If the **Broker Delivery Type** is blank, the title of this panel is **Ship-To # Details**, where # is the *Ship-To Number*.
- If the **Broker Delivery Type** is **S** (Ship for Pickup), the title of this panel is **Ship for Pickup Details**. **Note:** This includes pickup orders from Order Orchestration (retail pickup).
- If the **Broker Delivery Type** is **P** (Store Pickup), the title of this panel is **Store Pickup Details**.

Ship-To Address Panel

Where Does the Shipping Address Come From?

- If the *Capture Addresses for Invoice (J24)* system control value is selected, the invoice ship-to address is the name and address from the Invoice Address table where the **Type** is set to **S**.
- If the *Capture Addresses for Invoice (J24)* system control value is unselected, depending on how you create the order, the shipping address can be:

  For a customer ship-to address:

  - An order-level shipping address that is stored in the Order Ship To Address table.
  - A permanent shipping address for the sold-to customer on the order, stored in the Customer Ship To table.
  - A recipient customer, stored in the Customer Sold To table.
  - The name and address of the Customer Sold To who placed the order, stored in the Customer Sold To table.

  For a store ship-to address: The name and address of the store where the customer will pick up the order, stored in the Store Cross Reference table.

The **Ship-To Address** panel displays the following fields:

- *Customer Name* or *Store Name* (unlabeled field below the **Ship-To Address** title): The customer name displays in prefix, first name, middle initial, and last name format.
  - If a *Company Name* is also defined, the company name displays below the ship-to customer name.
  - If a *Company Name* is defined without a ship-to customer name, the company name displays in place of the ship-to customer name.
- *Customer Address* or *Store Address* (unlabeled fields below the **Customer Name** or **Store Name**)
- *Phone Number* (unlabeled field below the **Address**): Up to three phone numbers may be shown with the type shown in brackets such as (508) 652–3800 (Business). If more than one phone number is defined for the sold-to customer and only one is shown such as in a one-time ship-to order, the system uses the following hierarchy to display the phone number:
  - home phone number
  - business phone number that also supports a phone extension
  - mobile or fax phone number as determined by Third Phone Number Type (L53) system control value.

The phone number displays in the telephone number format defined for the country on the customer's address.

> **Note:**
>
> The **Phone Number** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

 # Order Lines In This Invoice Panel

The system displays item information for each invoice line on the invoice. Items display for the invoice in ascending invoice line number sequence.

The following fields display for each invoice line.

- **Number of Order Lines** (unlabeled field in the **Order Lines In This Invoice** title): This is the total number of invoice lines for the ship-to that are included on the invoice.
- *Invoice Line Number* (unlabeled field below the **# Order Lines In This Invoice** title)
- *Item Description* (unlabeled field to the right of the **Order Line Number**)
- *Item Image*: *Displays only if the Use External Item Image (L55)* system control value is selected.
- *Item ID* (unlabeled field to the right of the **Item Description**)
- *SKU Description* (unlabeled field below the **Item Description** and to the right of the **Item Image**)
- *Personalization (Special Handling)*: This field displays only if personalization has been defined for the item (the **Add Addl Chg Code** for the order line in the Order Detail table contains a value).
- *Personalization (Special Handling) Charge*: This field displays only if personalization has been defined for the item (the **Add Addl Chg Code** for the order line in the Order Detail table contains a value).
- *Gift Wrap Charge*: This field displays only if gift wrap has been defined for the item (the **Gift Wrap** for the order line in the Order Detail table is **Y**). In addition, the **Gift Wrap Charge** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.
- *Unit Price*
- *Extended Price*
- **Shipped** (*Shipped Quantity*): This field displays only on a debit invoice.
- *Ship Date*
- **Returned** (*Returned Quantity*): This field displays only on a credit invoice.
- *Return Date*: This field displays only on a credit invoice.
- *Credited*: This field displays only on a credit invoice.
- *Credited Date*: This field displays only on a credit invoice.

Invoice Payment Information Panel

Use the **Invoice Payment Information** panel to review the distribution of payment methods on an order invoice and to select a specific payment method for detailed review.

Payment methods display in ascending charge sequence number, ascending payment type description sequence. The catch all payment method displays last.

- *Payment Method*
- *Invoice Date*
- *Deposit to Date*
- *Deposit Remaining*
- *Invoice Total*
- **Release Date** (*Deposit Release Date*)

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Payment Configurations

Purpose: Use the **Payment Configurations** page to configure the merchants and payment methods used through integration with Oracle Retail EFTConnect. The Work with Authorization Service (WASV) option displays the merchant accounts that you create and work with in the Payment Configurations page.

> **Note:**
>
> Access to this page requires ALLOW authority to the WPMT (Payment Configurations) menu option. If you have DISPLAY authority, you cannot advance to this page.

About EFTConnect: Oracle Retail EFTConnect facilitates integration with *Account Providers*, such as CyberSource, Adyen, external payment services (EPS) and other custom Oracle Payment Interface (OPI) payment services. Use of EFTConnect removes any requirement to configure each credit card payment type in Order Administration; instead, the payment processor that hosts the payment form validates the card used on an order, including the card number length, format, leading digits, or expiration date.

Configuration for other payment methods: Use the Work with Pay Type (WPAY) option in Classic View for other payment methods, such as cash, check, PayPal, external payment service gift cards, or Customer Engagement stored value cards. Payment methods that have been configured through the Payment Configurations page in Modern View are display-only in the Work with Pay Type option in Classic View.

Required settings before you begin: Before you use this page to set up a merchant account for your brand and define payment methods, the following configuration is required in Classic View:

- **Properties:** Configure the following properties in Work with Admin Properties (CPRP):
  - ELO_CONFIG_URL: Used to establish a connection with EFTConnect when you use the Payment Configurations page. Contact your Oracle representative if this property is not defined, or if the Payment Configurations page in Modern View displays an error.
  - ELO_IDCS_ENDPOINT_URL: Used to request the token for OAuth authentication for the integration with EFTConnect. If this property is blank, the IDCS_SERVICE_ENDPOINT_URL is used. OAuth must also be configured for the outbound EFTConnect web service in Work with Web Service Authentication (WWSA).

> **Note:**
>
> The Client ID and Client Secret are from the EFTConnect record in Work with Web Service Authentication (WWSA). Regardless of which endpoint URL is used, the client ID and secret must be valid for the EFTConnect web service.

  - ELO_PAYMENT_URL: Defines the URL to use for any transactional communication with EFTConnect, such as obtaining a form token, authorization, or deposit. Required for use of the Payment Configurations page in Modern View.
  - ELO_THRESHOLD_TIME: Used for logging purposes. Compares the elapsed time of the web service with the ELO_THRESHOLD_TIME. If the elapsed time exceeds the threshold, a message is logged.
  - ELO_TIMEOUT: Defines the number of milliseconds to wait before requests from Order Administration to EFTConnect time out.
  - ELO_POLL_COUNT_THRESHOLD: Determines whether the transaction should be updated as unconfirmed if the threshold has been exceeded. It has a default threshold of 3, but this setting may need to be changed by the retailer. This value indicates the number of times that OACS calls EFTConnect to check if it has the status of the transaction (Capture, Refund, or Auth+Capture) from the payment provider. If the poll count is equal to or exceeds this setting, the status is changed to Unconfirmed. The deposit will need to be managed in Manage Rejected Deposits.
- **Authentication:** Set up outbound authentication for EFTConnect in Work with Web Service Authentication (WWSA). OAuth is required. Note that this authentication is company-specific; for example, if you use company 1 and company 2, you need to configure authentication in both companies. The retailer needs to copy the client secret from IDCS or OCI IAM and paste it in as the *Client Secret* for the EFTConnect record in Work with Web Service Authentication.
- **System control values:**
  - *Use Auto Authorization Interface (C14)* must be selected.
  - Selecting *On-Line Authorizations (B89)* is optional.
- For CyberSource, the *Merchant Account*, *Merchant Key*, and *Merchant Secret Key* are entered into the merchant service screen after selecting CyberSource.

> **Note:**
>
> It is the responsibility of the retailer to obtain their credentials from the payment service provider.

If the page does not load successfully: Reasons why the page does not load can include:

- If you do not have ALLOW authority to the WPMT (Payment Configurations) menu option, you cannot advance to this page.
- If the page displays an error such as Access to Payment Configurations is not allowed. Contact your system administrator, this can indicate that one of the

property settings listed above, such as the required URLs, are not set to valid URLs. The error might also include additional information, such as EFT Connect Configuration URL value is invalid or EFT Connect Payments URL value is invalid.

- If the *Auto Authorization Interface (C14)* system control value is not selected, the page displays an error: Access to Payment Configurations is not allowed. Contact your system administrator.
- If any of the required properties are not defined correctly in Work with Admin Properties:
  - EFT Connect Configuration URL value is invalid: Indicates that the ELO_CONFIG_URL is not set correctly.
  - EFT Connect Payment URL value is invalid: Indicates that the ELO_PAYMENT_URL is not set correctly.

Pending Transactions:

Use the EFTSTA periodic function (PfrEFTStat) to request payment status updates for pending authorization void, capture and refund transactions in EFTConnect. This function checks the status in EFTConnect of each order payment transaction record that is currently in SENT status, as this status indicates that Order Administration previously received a PENDING result code from EFTConnect for the transaction. Some payment providers process some messages asynchronously (typically can be Captures and Refunds) and will return initial result as “PENDING”, and at a later point will notify EFTConnect with the final result of the transaction. This requires Order Administration to periodically request status updates for the transactions in this status. When Order Administration receives a PENDING result code in an authorization reversal (VOID) response message from EFTConnect, the IL outbound record status will be changed to P (PENDING).

This function uses the new ELO_POLL_COUNT_THRESHOLD property in CPRP to determine whether the transaction should be updated as unconfirmed. It has a default threshold of 3, but this setting may need to be changed by the retailer. This value indicates the number of times that OMS calls EFTConnect to check if it has the status of the transaction (Capture, Refund, or Auth+Capture) from the payment provider. If the poll count is equal to or exceeds this setting, the status is changed to Unconfirmed. The deposit will need to be managed in Manage Rejected Deposits.

You should schedule this job to run at least a half hour after running deposits to allow time for processing of the requests. The exact interval to allow between running deposits and this job depends on the quantity of requests you are processing.

Fraud Processing:

When *Use Fraud Checking* is enabled on the Payment Configurations Merchant Account screen, the first authorization sent for each order payment method will request that the payment processor perform fraud checking. With CyberSource, fraud checking will be performed through Decision Manager. Additional configuration within Order Administration is no longer required.

When an authorization is under review, the order will be placed on a header system level hold of FS (Fraud Scoring Hold) and a pay type system level hold of PF (Payment Fraud Scoring Hold).

> **Note:**
>
> If the PF hold reason code is already in use, the description will be updated to Payment Fraud Scoring Hold and you should consider creating a different code for other user hold processes.

Use the EFTFRA periodic function (PfrEFTFraud) to request payment status updates for authorization transactions under REVIEW in EFTConnect.

- If result is REVIEW, no changes will be made, and the status will be checked next time the job is run.
- If result is REJECT, the order is canceled using the reason code in the *Fraud Score Cancel Reason Code (M14)* system control value.
- If result is ACCEPT, the order and pay type holds will be released and the order can now follow normal processing.

Authorization Reversals

When *Send Authorization Reversal* is enabled on the Payment Configurations Merchant Account screen, the REVERSE periodic function now applies only to all open (Status is A or O) Authorization History records whose authorization service is eligible for authorization reversal.

> **Note:**
>
> This periodic function no longer uses *Send Reversal* on the Work with Pay Type (WPAY) record or a restriction of not more than 72 hours old.

This periodic function applies only to credit cards that are configured through the Payment Configurations option in Modern View. It does not apply to ORCE Stored Value Cards, External Payment Service Gift Cards or to PayPal.

EFTConnect Data Storage

Requests are sent to EFTConnect when an order purge occurs to confirm the purge of payment-related data. You can purge orders through Purge Orders (MPOR), Purge Orders by Order Number (MORP), or the PURGEOR periodic function.

New Web Service Message Versions

The following new message versions no longer include tags that pass the credit card number for an order and instead include tags that pass the card token. These changes were made because in 23.2.401.0 or higher, the message includes only an already tokenized card number.

> **Note:**
>
> The previous versions of these messages are no longer available. You need to use the new message versions listed below.

- CWEmailOut: New version 13.0 no longer includes the opm_credit_card tag and includes instead the card_token tag.
- CWInvoiceOut: New version 7.0 no longer includes the ipm_credit_card_nbr and instead includes the card_token tag.
- CWOrderIn: New version 12.0 no longer includes the cc_number or already_tokenized tags, but instead includes the new card_token, psp_payment_scheme, and psp_customer_token tags.
- CWOrderOut: New version 12.0 no longer includes the credit_card_nbr tag, but instead includes the new card_token tag.

Displaying Credit Card Numbers: Storing credit card numbers are no longer supported. Instead, the Credit Card Last 4 or the Card Token will be displayed on all Classic View screens or reports where previously the credit card number would have displayed. Additionally, all Classic View screen labels have been updated to say Card instead of Credit Card.

Search by Credit Card Number: The Credit card # field is no longer available at the Classic View Order Inquiry scan screen, so that you can no longer advance to the Scan by Credit Card screen.

How to display: Select **Payment Configurations** from a menu.

For more information:

- *Payment Configuration Options* for step-by-step instructions on the actions you can perform on the **Payment Configurations** page.
- *Fields on Payment Configurations* for a description of the fields on the **Payment Configurations** page.

Payment Configurations Options

Purpose: The options at the Payment Configurations page and related windows are described below.

For more information:

- *Payment Configurations* for an overview of the **Payment Configurations** page, including required configuration before you can use this page.
- *Fields on Payment Configurations* for a description of the fields on the **Payment Configurations** page.

Options at this page:

- *Add a Merchant Account*
- *Test a Connection*
- *Edit a Merchant Account*
- *Delete a Merchant Account*
- *Add a Payment Method*
- *Restrict Add Payment for a Merchant Account*
- *Allow Add Payment for a Merchant Account*
- *Edit Payment Method Details*

- *Delete a Payment Method*
- *Manage Payment Services*
- *Refresh the Displayed Information*

Add a Merchant Account

CyberSource, Adyen and OPI merchants can be set up as merchant accounts.

> **Note:**
>
> You cannot create a merchant account unless the required settings described for the *Payment Configurations* page are complete.

1. Select **Add Merchant Account** to open the Merchant Account window.
2. Select an *Account Provider*. CyberSource and Adyen are base delivered providers and all other providers listed are custom Oracle Payment Interface (OPI) payment services. See *Add a Custom Payment Service* for more details.
3. Select the Payment Category such as **Credit or Debit, or Wallets**. The main Payment Configurations screen displays your selection next to the *Merchant Description*.
4. Click **OK** to continue.
5. The full *Merchant Account* window opens, displaying additional fields. See *Merchant Account Window* for field descriptions. The *Account Provider* and the *Payment Category* are display-only.
6. Enter the *Merchant Description* to describe the merchant account in EFTConnect. The *Merchant Identification* will be assigned automatically when you create the account.
7. The next set of dynamic fields vary depending on whether you selected CyberSource, Adyen or OPI custom payment provider.
   - If you selected CyberSource, enter the *Merchant Account*, *Merchant Key*, and *Merchant Secret Key* provided by your payment provider.
   - If you selected Adyen, enter the *Merchant Account*, *Merchant Key*, *Account Username*, *Account Password*, *Merchant Secret Key*, and *Live Account Prefix*. Also, enter one or more *HMAC Key* values.
   - Select **Live** or **Test**.

   Contact your *Account Provider* if you need information on the settings of these fields, which may be different to those listed above.
8. The following *Account Attribute* flags are unselected by default. Select as applicable.
   - *Void Remaining Authorizations at Deposit*
   - *Supports Authorization Resubmission*
   - *Send Authorization Reversal*
   - *Exclude from Deferred or Installment Payment Plans*
   - *Use for Installment Billing*

- *Use Fraud Checking*
- *Override Reconciliation Identification*

Updates at creation:

- The merchant information is submitted to EFTConnect, where the merchant record is created.
- An authorization service record is created in Order Administration, and it is displayed in the Work with Authorization Service (WASV) menu option in Classic View.

  A delivered service code, such as E01 for the first merchant record created for the company, is assigned to the merchant record. This EFTConnect code will be displayed as the *Service code* in WASV, and follows the Merchant Description in the *Merchant Account Panel* on the Payment Configurations page. It is the next unassigned numeric value with a prefix of E.

  All EFTConnect generic message response and AVS reason codes are assigned to the merchant records. These codes are displayed through the WASV menu option.

  The Payment Configurations page displays the *Merchant Account Panel* for the new merchant record, including the assigned service code.

Additional setup in Classic View: After creating the merchant account, use the WASV menu option in Classic View to define hold reason codes or pop-up message text for the vendor responses, as well as any currency or country code cross-references. However, you need to use the Payment Configurations option in Modern View to apply any changes to the merchant account itself. The Change option for the authorization service is not supported in Classic View.

Test a Connection

Select the **Test Connection** (Test Connection) option for a merchant to test the connection between Order Administration and EFTConnect, as well as the connection to the payment provider, using the URLs defined in the related properties (CPRP).

In order to test connections, the merchant account needs to have at least one payment method defined.

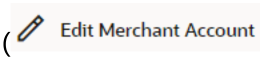
A message window indicates if the test was successful. If the connection fails, select **See All** at the message window to display the message returned from EFTConnect to describe why the test failed. These can include:

- At least one payment method needs to be defined in order to test the payment service: No payment methods have been defined for the merchant.
- *Account Provider* isn't known or is invalid: The Merchant Key or Merchant Secret Key is invalid.
- EFTConnect Configuration URL value is invalid or EFTConnect Payment URL value is invalid: The referenced properties are not set correctly Work with Admin Properties (CPRP) in Classic View.
- Communication failure or Invalid Data passed. Contact your system administrator: The ELO_PAYMENT_URL property in Work with Admin Properties (CPRP) in Classic View is not set correctly.

If there are multiple issues that could have caused the test to fail, only one message is displayed. For example, if the secret key is invalid and no payment methods have been defined, only the second message (Account provided isn’t known or is invalid) is displayed.

You need to select **Dismiss** to close the message windows, including the failure message if currently open.

Edit a Merchant Account

Select the **Edit Merchant Account** (

) option for a merchant to edit the account for the merchant.

You can edit all fields except for the *Account Provider*, *Merchant Identification*, and *Payment Category*. See Add a Merchant Account, above, for more information on completing the window, and see *Merchant Account Window* for field descriptions.

Select **OK** to save your changes, or select **Cancel** to exit the window without saving.

You can also select **Delete Merchant Account** to delete the record.

Delete a Merchant Account

Select **Delete Merchant Account** from the actions menu ( ) for a merchant account to delete the merchant account record. The **Delete Merchant Account** option is also available at the Merchant Account window in edit mode.

> **Note:**
>
> You cannot delete a merchant account if there are any existing payment methods defined for the account.

After deletion, it is no longer displayed in Payment Configurations.

Updates: When you delete a merchant account, it is deleted in EFTConnect and is no longer displayed in the Work with Authorization Service (WASV) menu option in Classic View. Any dependent records are also deleted; this includes hold reason codes or pop-up message text for the vendor responses, as well as any currency or country code cross-references or merchant ID overrides by entity.

Add a Payment Method

Select **Add Payment Method** for a merchant account to add a payment method. At least one payment method is required to use the merchant account.

The *Payment Method Description* is required. The remaining fields are optional. See the Payment Method Details Window for details on how to enter the remaining fields.

You can select **OK** to add the payment method, or **Save and Add Another** to continue creating payment methods for the merchant account.

Once a payment method is created, it will display in Payment Configurations under the merchant account.

Updates: The pay method record is created in Order Administration, and is available for review in the Work with Pay Types (WPAY) option in Classic View. Note that you cannot edit the pay method record itself in Classic View. The pay method number code is automatically set to the next available pay method number; for example, if a pay method 1 and 2 already exist, the new pay method record is assigned number 3. The Authorization Service and Deposit Service displayed for the pay method are both set to the service code, such as E01 for the first merchant record created for the company. The payment method is also linked to the merchant account in EFTConnect.

Additional setup in Classic View: You can use the Work with Pay Types (WPAY) option in Classic View to set up user fields. You first need to use the Work with User Defined Fields (WUDF) menu option to define the available fields. It is not necessary to set up credit card formats, as they are not used in processing with EFTConnect.

Restrict Add Payment for a Merchant Account

Select **Restrict Add Payment** from the actions menu (⋮) for a payment method assigned to a merchant account to restrict the use of the payment method. This option is displayed only if the payment method is not currently restricted. The status change to Restricted takes effect immediately and is shown under the Status column for the merchant account. The payment method is not eligible to be used on an order.

Allow Add Payment for a Merchant Account

Select **Allow Add Payment** from the actions menu (⋮) for a payment method assigned to a merchant account to allow the use of the payment method. This option is displayed only if the payment method is currently restricted. The status change to Allowed takes effect immediately and is shown under the Status column for the merchant account.

Edit Payment Method Details

Select **Edit Payment Method Details** from the actions menu (⋮) for a payment method assigned to a merchant account to open the Payment Method Details Window. You can edit any fields except the *Payment Category* or the *Payment Method*.

Delete a Payment Method

Select **Delete Payment Method** from the actions menu (⋮) for a payment method assigned to a merchant account to delete the payment method.

You can also delete a payment method by selecting **Delete Payment Method** at the Payment Method Details Window.

The payment method is no longer displayed under the merchant account or in the Work with Pay Types (WPAY) option in Classic View. Any user-defined fields for the pay type are also deleted, and the payment method is no longer linked to the merchant account in EFTConnect.

> **Note:**
>
> You should not delete a payment method that has been used on any existing orders.

Manage Payment Services

The **Manage Payment Services** option is used to configure an Oracle Payment Interface (OPI) Custom Payment Service. The Custom Payment Service allows the retailer to provide details about which Payment Service Provider (PSP), payment methods and dynamic fields are supported and required to be populated.

> **Note:**
>
> The Payment Services entered here are not company specific. Enter them once, and they are available for selection when creating Merchant Accounts for all of the companies.

Select the **Manage Payment Services** option to open the Payment Services window. If any payment services have been entered previously, they are listed.

The following options are available:

- Add a Custom Payment Service
- Edit/View Details for the Custom Payment Service
- Payment Service Test Connection
- Delete a Custom Payment Service

Add a Custom Payment Service

1. Select **Add Payment Service**. The Payment Services Details window opens to enter the details of the payment service.
2. Enter the *Service Name*.
3. Enter the *Service URL* of the custom payment service.
4. Enter the *OAuth Service URL*.
5. Enter the *OAuth Client ID* for the external server that provides the Oauth authentication.
6. Enter the *OAuth Client Secret* for the external server that provides the Oauth authentication.
7. Enter the *Scope* for the external server that provides the Oauth authentication.
8. Select **OK** to validate the fields. A call is made to the Payment Service URL. If communication is successful, the Payment Service window opens and the results show that the newly entered payment service is listed. The *Last Tested* date and time is updated, each time **OK** is selected.

   If communication fails to the Payment Service, an error displays at the top of the Payment Service window as **Communication error**.

   If communication is successful to the Payment Service but fails to connect to EFTConnect, an error will display at the top of the Payment Service window: **Communication error, contact your system administrator.**

Edit/View Details for the Custom Payment Service

Select **Details** from the actions menu (⋮) for a payment service. You can edit any fields in the Payment Services Details window except the *Service Name*.

Select **OK** to validate the fields. A call is made to the Payment Service URL. If communication is successful, the Payment Services window opens and the *Last Tested* date and time is updated.

Payment Service Test Connection

When the **Test Connection** button is clicked from the actions menu (⋮) for a payment service, a call is made to the Payment Service URL. The *Last Tested* date and time are updated for the payment service whether communication is successful or fails. A snackbar message indicates if the test connection was successful.

If communication fails to the Payment Service, a snackbar message indicates a failed test connection.

Delete a Custom Payment Service

Select **Delete** from the actions menu (⋮) to delete a payment service. If a payment service is already connected to a Merchant Account record, it cannot be deleted. A snackbar message indicates if the payment services was successfully deleted. Click **OK** to dismiss the snackbar message.

Refresh the Displayed Information

Select the **Refresh** option (Refresh) to refresh the information displayed on the Payment Configurations page.

Fields on Payment Configurations

Purpose: The following information is on the **Payment Configurations** page and related windows.

- *Merchant Account Panel*
- *Merchant Account Window*
- *Payment Method Details Window*

For more information:

- *Payment Configurations* for an overview of the **Payment Configurations** page.
- *Payment Configurations Options* for a description of the options available at the **Payment Configurations** page.

Merchant Account Panel

Displayed for each existing merchant account at the **Payment Configurations** page.

Merchant Description: The Merchant Description defined when you are configuring the account at the Merchant Account Window, followed by the delivered service code, such as E01 for the first merchant record created for the company, in parentheses. The service code, derived from EFTConnect, is the next unassigned numeric value with a prefix of E. The description is then followed by the Payment Category. The categories available vary depending on the *Account Provider*, such as CyberSource or Adyen.

Account Provider, Environment (Live or Test), and the following additional settings:

- **Multiple Deposits for Authorizations Allowed:** Displayed if the Void Remaining Authorization at Deposit flag is not selected.
- **Send Authorization Reversal:** Displayed if the Send Reversal flag is selected.

- **Void Remaining Authorization at Deposit:** Displayed if the Void Remaining Authorization at Deposit flag is selected.

Payment method fields: Displayed for each payment method defined for the merchant account.

- **Payment Method Description:** The description defined for the payment method, followed by the numeric code in parentheses. This is the pay method code displayed in Work with Pay Types (WPAY) in Classic View. The next unassigned numeric code is assigned automatically when you create the payment method for the merchant account, and displayed to the right in parentheses.
- **Details:** The number of *Reauthorization Days* defined.
- **Status:** Allowed or Restricted.
- **Actions** menu (⋮) to advance to the Payment Method Menu where you perform the following tasks: Restrict Add Payment for a Merchant Account, *Edit Payment Method Details*, or *Delete a Payment Method*.

Merchant Account Window

How to display: Select **Add Merchant Account** at the Payment Configurations page, or select **Edit Merchant Account** from the Merchant Account panel for an existing merchant account.

Account Provider The payment gateway provider, such as CyberSource or Adyen. When creating a merchant account, you can select one of the account providers defined for your organization in EFTConnect. Your Oracle representative configures these providers in EFTConnect.

Merchant Identification: Display-only field that is displayed when you select to edit an existing merchant account. Identifies the brand for your company. Formatted as 123–CYBERSOURCE-001 where 123 is the company number (zero-filled) where you created the merchant account record, CYBERSOURCE is the *Account Provider*, and 001 is a sequence number to identify the merchant account for the company. Automatically assigned when you create a merchant account. The *Merchant Identification* is labeled the *Merchant ID* in WASV.

Payment Category Indicates the types of payments supported. Categories available are **Credit or Debit** and **Wallets**.

Merchant Description: Describes the merchant account in EFTConnect. The *Merchant Description* is labeled the *Charge description* in WASV.

Merchant Account: Identifies your account in EFTConnect. Provided by Oracle staff.

Merchant Key: The key to use for authentication of your account in EFTConnect. Provided by Oracle staff.

Merchant Secret Key: The secret key to use for authentication of your account in EFTConnect. Provided by Oracle staff. Optionally, select the eye icon to display or hide.

The next set of dynamic fields vary depending on whether CyberSource, Adyen or OPI custom payment provider was selected as the *Account Provider*. For Adyen, addition fields are shown. Live Account Prefix .is the prefix for the live URL and is required for live transactions. One or more HMAC Key values, labeled HMAC Key, HMAC Key 1, HMAC Key 2, HMAC Key 3, and HMAC Key 4 are required for hash-based message authentication. Provided by Oracle staff. These fields are not required or displayed for CyberSource.

Environment: Set to Live or Test to indicate whether the transactions will take place in a live or test environment.

The following *Account Attribute* flags are unselected by default. Optionfally, you can select them as described below:

- **Void Remaining Authorization at Deposit:**
  - Selected: The system voids any unused portion of an authorization for a payment card pay method at deposit time. Order Administration will need to obtain an additional authorization for any subsequent deposits for the order.
  - Unselected: The system retains any unused portion of an authorization for a payment card pay method at deposit time.

  > **Note:**
  >
  > Your end payment processor needs to support multiple captures and support split shipments if you have this flag unselected.

- **Supports Authorization Resubmission:** Indicates whether to resubmit failed authorization and deposit requests for credit cards.

  When you select this flag and are using CyberSource, the subsequentAuthReason in the authorization and deposit request is set to **1**; otherwise it is set to **3**. If the payment card is replaced since the initial deposit request, then the subsequentAuthReason is set to 3, since it is not considered a subsequent authorization and deposit request.

  > **Important:**
  >
  > Select this flag only if your payment processor supports merchant-initiated resubmission of failed deposits.

- **Send Authorization Reversal:** Defines whether the REVERSE Send Reversals for Expired Authorizations (program name PFR0133) periodic function processes all open Authorization History records for this merchant account that are eligible for authorization reversal.
  - Selected = The REVERSE periodic function processes all open Authorization History records for this merchant account that are eligible for authorization reversal.
  - Unselected = The REVERSE periodic function does not process open Authorization History records for this merchant account.

  > **Note:**
  >
  > The REVERSE periodic function applies only to credit cards. It does not apply to gift cards or to PayPal.

- **Exclude from Deferred or Installment Payment Plans:** Indicates whether to exclude orders associated with this merchant account from a deferred or installment pay plan. If an order includes any pay type whose authorization service has this field selected, the order is not eligible for a pay plan.

- **Use for Installment Billing:** Indicates if the merchant account supports installment billing of payment cards. Installment billing plans are typically established for high cost items. This field is informational only and is not used to set up an installment pay plan in Order Administration. Valid values are:
  - Selected = The merchant account supports installment billing.
  - Unselected = The merchant account does not support installment billing.
- **Use Fraud Checking:** Indicates if fraud checking is performed for the payment method. For EFTConnect type authorizations only.
- **Override Reconciliation Identification:** Optionally, use this field when defining a merchant account to define the value to pass as the reconciliation in a debit deposit, credit deposit, or authorization and deposit request. You can select None, Invoice Number, or Alternate Order Number. Defaults to None.

Delete a Merchant Account

Payment Method Details Window

How to display: Select **Add Payment Method** for an existing account at the Merchant Account Panel, or select **Edit Payment Method Details** for an existing payment method for a merchant account.

Payment Category Indicates the types of payments (**Credit or Debit** or **Wallets**) selected for the Merchant Account. Display-only.

Payment Method When creating a new payment method, set this field to be the same as the Payment Category. This field is display-only when you are editing a payment method.

Payment Method Description: The description defined for the payment method. This is the pay type code displayed in Work with Pay Types (WPAY) in Classic View. The next unassigned code is assigned automatically when you create the payment method for the merchant account. Up to 30 positions. Required. The **Payment Method Description** should be named uniquely so the payment method is easily identified. Specific Schemes like Visa, Mastercard, Apple Pay are not shown when selecting a *Payment Method* .

Reauthorization Days: The number of days before a credit card authorization is set to expire.

> **Important:**
>
> If online authorization is enabled, you should specify this number of days for a payment method in order to prevent repeated, unnecessary authorization requests. If this field is zero for a payment card pay method, the authorization expires immediately. Also, if the order is submitted to Order Orchestration for fulfillment, there will be unsuccessful authorization attempts.

The REAUTH periodic function uses this data to determine when to attempt to reauthorize an expired authorization. Only pay methods that have this field set to a number greater than 0 are eligible for reauthorization attempts. Also, the REAUTH periodic function does not attempt to reauthorize PayPal. See Reauthorizing Expired Authorizations in the Technical Guide for more information.

Numeric, up to 100 positions. Defaults to 0, indicating not to reauthorize.

Restrict Payment Method: Select this flag to indicate that the payment method is not yet eligible to be used on an order. The current setting is indicated on the Merchant Account Panel.

Notify of Subsequent Authorization Installments: Indicates whether to send a commerceIndicator set to install in the subsequent authorization and deposit request to EFT Connect for an order using a deferred or installment pay plan.

> **Important:**
>
> To determine how to set this flag if you offer deferred or installment billing and use CyberSource, you need to confirm the information that the end processor requires for deferred or installment payment plans for each payment type.

- Selected = The commerceIndicator is set to install in the authorization and deposit request for a subsequent request, and no subsequentAuthReason, subsequentAuthStoredCredential, or subsequentAuthOriginalAmount is passed.
- Unselected (default) = The authorization and deposit request includes the commerceIndicator set to either moto or internet, based on where the order originated, and also includes the subsequentAuthReason, subsequentAuthStoredCredential, and subsequentAuthOriginalAmount, similar to the request for a split shipment.

Display-only when you are editing a payment method.

Alternate Refund Payment Method: The pay type to use for refunds to this pay type, if different. Change this setting only if the pay method for refunds is different from the pay method used on the order; otherwise, leave it set to None. Each additional existing cash/check or stored value (gift) card pay method is available for selection.

The system checks the appropriate values defined for the alternate refund pay method, not the original pay method, when generating refunds.

> **Note:**
>
> This field is not displayed if the *Use CC Net Exchange Billing (M23)* system control value is selected. If you enable credit card net exchange billing after defining an alternate refund payment method, the system ignores the defined payment method.

Defaults to **None**, indicating to use the same pay method for refunds.

Alternate Refund Category: The pay category to which the system-generated refund can be charged during refund maintenance. Valid values are:

- Cash/Check
- Credit Card

When you define an alternate refund category for a pay method, you give yourself the option of changing the refund to the method that corresponds to this category.

Defaults to **None**, indicating not to use a different pay category for refunds.

> **Note:**
>
> This field is not displayed if the *Use CC Net Exchange Billing (M23)* system control value is selected. If you enable credit card net exchange billing after defining an alternate refund category, the system ignores the defined refund category.

Balance Due Amount Maximum: If a customer short pays an order by an amount equal to or greater than this amount, the system places the order automatically on **BD** (Balance Due) hold.

> **Note:**
>
> Orders are evaluated for the **Balance Due Amount Maximum** and the**Balance Due Percentage Maximum**. The balance due percentage limit takes precedence over balance due amount limit, so the system puts the order on hold when it is underpaid by the percentage even if it not underpaid by the dollar amount.

Example: A customer underpays a 1,250.00 order by 25.00. The balance due amount is 5.00; however, the balance due percentage maximum is 5%. Five percent of this order is 62.50. This order does not go on hold, because the customer has underpaid by more than the balance due maximum but less than the balance due percentage maximum.

> **Note:**
>
> If the underpaid amount is less than the amount specified here (and there is balance due percentage maximum specified), the order does not go on hold. The system creates a balance due record (negative refund record) and puts this record into a write-off pending status. These refund write-off amounts accumulate for the sold-to customer, and can be applied to a subsequent order as an additional charge, using the *Default Additional Charge Code (C45)*.

Numeric, up to 13 positions with a 2–position decimal. Defaults to 0, indicating that there is no maximum balance due amount.

Balance Due Percentage Maximum: If a customer underpays on an order by a percentage equal to or greater than this amount, the system places the order on hold.

> **Note:**
>
> Orders are evaluated for both the **Balance Due Amount Maximum** and the **Balance Due Percentage Maximum:**. The percentage maximum takes priority over the balance due amount maximum. See the **Balance Due Amount Maximum**, above, for a discussion.

Numeric, up to 13 positions with a 2–position decimal. Defaults to 0, indicating that there is no balance due percentage maximum.

Order Amount Maximum: If the order total meets or exceeds this amount, the system places the order on DH (dollar) hold.

If there is more than one payment method on the order, the system places the order on hold if the order total meets or exceeds the Order Amount Maximum for any pay method.

Numeric, up to 13 positions with a 2–position decimal. Defaults to 0, indicating not to put the order on hold based on order total.

Hold Days: The number of days to hold an order using this payment method. The system releases the order from hold automatically through daily periodic processing once the number specified here has passed.

Numeric, up to 3 positions. Defaults to 0, indicating not to put an order on hold because it uses this payment method.

Refund Check Minimum Amount: The minimum dollar amount for which you issue a refund. Refunds less than this amount are put in a write-off pending status. These write-off amounts accumulate in the Customer Sold-to table and can be used as an order credit on a subsequent order. The *Default Cash Pay Type (C07)* to be used in these instances is defined in the System Control table.

If a pay method has an alternate refund type, the system checks the refund check minimum for the alternate refund type.

Numeric, up to 13 positions with a 2–position decimal. Defaults to 0, indicating that there is no refund check minimum amount.

Refund Check Maximum Amount: The maximum dollar amount for automatic refund creation.

Any refund exceeding this dollar amount is put on hold. For example, if you leave this field blank for a credit card alternate refund type, all refunds will go on hold because they exceed the blank (zero) amount.

If a pay method has an alternate refund type, the system checks the refund check minimum for the alternate refund type.

Numeric, up to 13 positions with a 2–position decimal. Defaults to 0, indicating that there is no maximum refund amount.

Release Days: The number of days to hold a refund from processing. The system changes the status of the refund to “open” when you process the refund if the release days have passed. This feature ensures that the customer's check for the order clears before you print a refund check for the overpayment.

If a pay method has an alternate refund type, the system checks the refund check minimum for the alternate refund type.

Numeric, up to 3 positions. A release days setting of 0 indicates not to hold a refund from processing.

Store Tender: A cross-reference to the corresponding tender code in a point-of-sale system. This field is available only if you specify the *Default Location for ORCE Integration (K69)*.

This code is passed in the POSLog integration to Customer Engagement as the tender ID, which can be used as a loyalty qualifier.

Alphanumeric, 4 positions; optional.

ChannelAdvisor Cross Reference Number: A cross-reference to a ChannelAdvisor marketplace, set up through Work with ChannelAdvisor Offers Screen, from which you receive orders:

- If the CAORDUP periodic function creates an order from ChannelAdvisor, and the ItemSaleSource passed for the order matches this cross-reference, the periodic function assigns this payment method to the order. Your marketplace needs to match a ChannelAdvisor Site Token value.
- If an order has a payment method whose cross-reference matches a ChannelAdvisor marketplace and also matches the *ChannelAdvisor Order Type (L90)*, the Processing Refunds (MREF) option submits any pending refunds for the order to ChannelAdvisor, and does not actually generate the refund.

If more than one pay method has the same matching cross-reference, the periodic function selects the pay method with the highest pay method code.

This field is available only if the *ChannelAdvisor Order Type (L90)* system control value specifies an order type.

ChannelAdvisor Type: Controls how the CAORDUP periodic function calculates shipping and tax, and how refund amounts are passed when submitting ChannelAdvisor orders. If this field is set to:

- **Item Level** or **None** = Consistent with the Amazon and eBay with premium tax marketplaces:
  - the CAORDUP periodic function calculates shipping and tax based on the amounts in the OrderLineItemItem element
  - refund processing calculates tax and shipping at the item level and passes these amounts in the RefundItem level in the SubmitOrderRefund message
- **Order Level** = Consistent with the eBay marketplace (without premium tax):
  - the CAORDUP periodic function uses the tax and shipping amounts from the OrderLineItemInvoice element and prorates them across the lines on the order
  - the SubmitOrderRefund message specifies amounts at the order level

This field is available only if the *ChannelAdvisor Order Type (L90)* system control value specifies an order type.

Payment Services Window

How to display: Select **Manage Payment Services** from Payment Configurations.

Add Payment Service: Button to advance to the *Payment Service Details* window.

Service Name: Displays the Service Name returned from EFTConnect.

Last Tested: Displays the date and time that the connection of this service was last tested.

Payment Service Details Window

How to display: Select **Add Payment Service** from **Manage Payment Services** or **Details** for an existing payment service for a Merchant Account.

Service Name: Required. This must be unique. It is shown in the Payment Services list and displayed with the Merchant Account on the **Payment Configurations** page.

Service URL: Required. URL of the Custom Payment Service which is typically the Retailers Middleware tool.

OAuth Service URL: Required. Service URL (Token endpoint) for the External Server that provides the Oauth authentication.

OAuth Client ID: Required. Client ID for the External Server that provides the Oauth authentication.

OAuth Client Secret: Required. Client Secret for the External Server that provides the Oauth authentication. This field must be masked.

Scope: Optional field. Scope for the External Server that provides the Oauth authentication.

64 Manage Rejected Deposits

Overview: Use the Manage Rejected Deposits page to review and resubmit deposits and credit card credits that were not completely processed through the Process Auto Deposits function.

Needed when? When you use the Process Auto Deposits function to transmit credit card deposit information to a deposit service for settlement, the deposit service normally confirms each deposit and credit. If a transaction is not confirmed because, for example, the deposit service rejected the deposit, the system flags the record in the Invoice Payment Method table.

Uses: You can use the Resubmit Rejected Deposit function to select records you want to resubmit, and change their status so that they are eligible to be processed the next time you run Process Auto Deposits. You can also use this menu option to:

- review or edit the Invoice Payment Method
- confirm the deposit manually
- advance to invoice inquiry and other order inquiry options
- review deposit history
- write off the amount of the deposit

Forced deposits: Deferred or installment deposits that were rejected but flagged for “force deposit” are not available in Resubmit Rejected Deposits, because the system performs all updates as if the deposit service confirmed the deposit. Regular (non-pay plan) deposits are typically forced, although sometimes they are unconfirmed for other reasons. For more information, see the discussion of **Force Deposit** in the Processing Auto Deposits (SDEP) topic in the Classic View online help.

> **Note:**
>
> You cannot use the Resubmit Rejected Deposits function to resubmit transactions that you have set up to use the separate process for foreign currency when *Track Invoice Currency (D68)* is selected. Process Auto Deposits writes the foreign currency records to a separate table, rather than receiving settlement information interactively from the deposit service.

Suppressing deposits: You can suppress deposit processing for orders you receive through the Generic Order Interface (order API). In this situation, the order is not included when you reprocess deposits. See Suppressing Deposits and Refunds in the Classic View online help for an overview.

Resubmitting rejected deposits through CyberSource: The Supports Auth Resubmission flag in Work with Authorization Services (WASV) controls whether resubmitting rejected deposits is enabled for the authorization service. See Subsequent Authorization Requests to CyberSource in the Classic View online help for information on how rejected deposits are resubmitted to CyberSource.

More information: See Processing Auto Deposits (SDEP) in the Classic View online help for more information on the Process Auto Deposits function, the separate process for foreign currency deposit processing, and an overview of how deferred or installment pay plans differ from regular (non-pay plan) deposits.

How to display: Select **Manage Rejected Deposits** from a menu.

Required authority: To advance to this page, you need full (not Display) authority to the SRDP menu option. See Setting Up Menu Options (WOPT) and the Work with Menu Option Authority Screen in the Classic View online help for background.

For more information:

- Manage Rejected Deposits Options for step-by-step instructions on the actions you can perform on the **Manage Rejected Deposits** page.
- Fields on Manage Rejected Deposits for a description of the fields on the **Manage Rejected Deposits** page.

Manage Rejected Deposits Options

Purpose: You can perform the following actions on the Manage Rejected Deposits page.

- Resubmit Deposits by Date Range
- Refresh the Displayed Data
- Filter the Displayed Rejected Deposits
- Confirm One or More Deposits Manually
- Resubmit One or More Deposits
- Write Off the Full Amount of One or More Deposits
- View Invoice Details
- Replace the Payment Method for a Deposit
- Edit the Expiration Date for a Payment Method
- View Write-Off Details, or Enter a Full or Partial Writeoff Amount
- View Prepaid Payment Details or Apply a Prepayment
- View or Edit Installment Plan Details
- View Payment Method Details
- View Deposit History
- View Remaining Amount Due and the Release Date

For more information:

- Manage Rejected Deposits for an overview of the **Manage Rejected Deposits** page.
- Fields on Manage Rejected Deposits for a description of the fields on the **Manage Rejected Deposits** page.

Resubmit Deposits by Date Range

When to use: You might use this option for a group of deposits that failed because of a communication error on a particular date or within range of dates. Each resubmitted deposit is eligible for selection the next time you process deposits.

From the initial Manage Rejected Deposits page: Select Resubmit by Date Range from the top of the page to open the Resubmit by Date Range Window.

Completing the window: At the window, complete the Reject Date Range From and Reject Date Range To fields to indicate the range of dates to resubmit. Optionally, you can then select a specific Reject Reason, or leave this field unselected to submit all rejected deposits for the date range regardless of reason for rejection.

Updates at confirmation: Each resubmitted deposit is eligible to be processed the next time you submit deposits, and:

- The deposit is removed from the Manage Rejected Deposits page, and the invoice cannot be resubmitted for the deposit.
- You can see an entry under *Payment Method Details* for the payment method on the order from the Order Summary page:
  - Under Transactions: The status is Resubmitted, and the Amount, Sent Date, and Authorization Number are the same as the original Authorization record.
  - Under Activity: The Date is the current date, and the Note displayed is Resubmit deposit D $12.34, where 12.34 is the amount resubmitted.

> **Note:**
>
> The deposit will fail again if the expiration date for the credit card has passed.

Refresh the Displayed Data

Select **Refresh** at the upper right of the initial Manage Rejected Deposits page to refresh the displayed rejected deposits and all totals. When you select this option, it deselects any currently selected deposits.

Filter the Displayed Rejected Deposits

Use the Filters to restrict the displayed rejected deposits and to recalculate the amounts displayed in the summary tiles. See *Filters* and *Summary Tiles* for more information

Confirm One or More Deposits Manually

When to use: You might use this option when you did not receive a confirmation through Process Deposits, but the deposit service indicates that the deposit was confirmed.

From the initial Manage Rejected Deposits page: Select one or more rejected deposits from the *Rejected Deposits* list and select **Confirm Manually** from the Actions drop-down menu for the displayed deposit.

From the Invoice Details page: Select **Confirm Manually** from the Actions drop-down menu.

Updates at confirmation: Processes all the same updates for the deposit as when it is processed automatically through the Process Auto Deposits option (SDEP) in Modern View, including:

- The Deposit created date for the Invoice Pay Method is set to the current date.
- The deposit is removed from the Manage Rejected Deposits page, and the invoice cannot be resubmitted for the deposit.
- You can see an entry under *Payment Method Details* for the payment method on the order from the Order Summary page:
  - Under *Transactions*: The status is Manual Confirm.
  - Under *Activity*: The Note displayed is Manual confirm deposit D $12.34, where 12.34 is the amount written off.

Resubmit One or More Deposits

When to use: You might use this option for deposits that failed initially because of a communication error. Each resubmitted deposit is eligible for selection the next time you process deposits.

From the initial Manage Rejected Deposits page: Select one or more rejected deposits from the *Rejected Deposits* list and select **Resubmit** from the Actions drop-down menu. Select OK at the **Confirm Resubmit** window to resubmit each selected deposit.

From the Invoice Details panel: Select **Resubmit** from the Actions drop-down menu for the displayed deposit. The *Confirm Resubmit Window* displays the Payment *Expiration Date* and the Release Date:

- If the *Payment Expiration Date* has passed, you can use the **Edit Expiration Date** option next to **Payment Information Details** to update it before you can resubmit. See *Edit the Expiration Date for a Payment Method* for more information.
- If the Release Date (the *Deposit Release Date*) has passed, you need to select the current date or a later date. Note that you do not need to change the release date when you resubmit one or more deposits from the initial Manage Rejected Deposits page.

Select **OK** to resubmit.

Updates at confirmation: Each resubmitted deposit is eligible to be processed the next time you submit deposits, and:

- The deposit is removed from the Manage Rejected Deposits page, and the invoice cannot be resubmitted for the deposit.
- You can see an entry under *Payment Method Details* for the payment method on the order from the Order Summary page:
  - Under *Transactions*: The status is Resubmitted, and the Amount, Sent Date, and Authorization Number are the same as the original Authorization record.
  - Under *Activity*: The Date is the current date, and the Note displayed is `Resubmit deposit D $12.34`, where `12.34` is the amount resubmitted.

Write Off the Full Amount of One or More Deposits

When to use: You might use this option when you do not expect to be able to process a deposit.

From the initial Manage Rejected Deposits page: Select one or more rejected deposits from the *Rejected Deposits* list and select **Write-Off Full Amount** from the Actions drop-down menu.

From the Invoice Details page: Select **Write-Off Full Amount** from the Actions drop-down menu for the displayed deposit.

Writeoff updates:

- The Deposit created date, displayed at the *Payment Method Details* panel from the *Invoice* page for the Invoice Pay Method, is set to **888888.**
- The deposit is removed from the Manage Rejected Deposits page, and the invoice cannot be resubmitted for the deposit.
- There is an entry for the writeoff at the *Payment Method Details* for the payment method on the order from the *Order Summary* page:
  - Under *Transactions*: The status is Written Off. Note that the date is the original Sent Date, and not the date when the writeoff occurred.
  - Under Activity: The Note displayed is `Writeoff deposit D $12.34`, where `12.34` is the amount written off.

View Invoice Details

Select **Invoice Details** for a rejected deposit from the *Rejected Deposits* list to open the Invoice Details panel. Invoice Detail options are described below.

Select **Cancel** or click the X on the upper right when you are done to return to the initial Manage Rejected Deposits page. Note that selecting Cancel does not undo any updates you have made through options at the Invoice Details panel.

Replace the Payment Method for a Deposit

Use this option to update the payment method for the invoice and automatically submit the deposit so that it is eligible for processing the next time you process deposits. At the initial Manage Rejected Deposits page, select **Invoice Details** next to a rejected deposit in the *Rejected Deposits* list, and scroll down to the **Payment Information Details**.

Select **Replace Payment Method** to open the initial **Edit Payment** window. At this window, the current Payment Method may default, but you can change it to another payment method associated with the same authorization service. No additional fields are displayed at this point.

When you select **OK** to confirm the Payment Method and if there are no errors, such as a restricted payment method or an invalid card number, the full *Edit Payment* window opens. Use this window to complete entry of the payment method.

> **Note:**
>
> Pay type records that have a **Card Type** of **Wallet** as viewed in the Classic View **Work with Payment Methods** (WPAY) are excluded from the list of replacement payment methods.

For more information: See the *Edit Payment* window for more information on fields and validation of this window. Note that the Amount to Charge field is not displayed when you replace the payment method through Manage Rejected Deposits.

When you select **OK**:

- The card number is updated.
- A *Snackbar Notification* indicates that the deposit has been resubmitted, and provides a link to the *Invoice* page for the Invoice Pay Method.
- The deposit is resubmitted, and is eligible for processing the next time you process deposits.

Changing the credit card number creates four Activity records under the *Activity Table* in the **Payment Method Details** panel, for example:

- An Activity of Card Number Changed (A) with a Note of card number has been changed.
- An Activity of Maintenance (M) with a Note of Card Exp Dt: 1022 to 1224
- An Activity of Maintenance (M) with a Note of CID Number: 0000 to 1234
- An Activity of Deposit (D) with a Note of Resubmit deposit D 12.81

Order transaction history messages are also written, as they are whenever the payment method on an order is changed.

When a Pay Method is selected from a different EFTConnect Merchant Account, the Replace Payment Method window allows the replacement card to be entered and tokenized. Once successful, the invoice payment method and order payment method are updated with the new payment method and order transaction notes are written as usual. For non-EFTConnect Merchant Accounts, you cannot pick a payment method associated to a different merchant account. This includes ORCE Stored Value Cards, External Payment Service Gift Cards and PayPal.

The invoice number displayed for the first three Activity records is 0, while the invoice number for the deposit is a link to the link to the *Invoice* page for the Invoice Pay Method.

> **Note:**
>
> You cannot replace the payment method if the order is currently locked for editing. Orders can be unlocked through the *Unlock Order* page.

Edit the Expiration Date for a Payment Method

At the initial Manage Rejected Deposits page, select **Invoice Details** next to a rejected deposit in the *Rejected Deposits* list, and scroll down to the **Payment Information Details**.

Select **Edit Expiration Date** to open the **Edit Expiration Date** window. This window displays the payment method, last 4 positions of the credit card number, and the current expiration date. Enter the new *Expiration Date* in MM/YY format. Your entry must be the current month or later.

The Expiration Date displayed under **Payment Information Details** reflects the date that you just entered.

Changing the Expiration Date creates two Activity records under the *Activity Table* in the **Payment Method Details** panel, for example:

- An Activity of Credit Card Number Changed (A) with a Note of Card Number has been changed.
- An Activity of Maintenance (M) with a Note of Card Exp Dt: 1022 to 1224

The invoice number displayed for these Activity records is 0.

Order transaction history messages are also written, as they are whenever the payment method on an order is changed.

> **Note:**
>
> You cannot edit the expiration date if the order is currently locked for editing. Orders can be unlocked through the *Unlock Order* page.

If using EFTConnect authorization service, a failure may occur if the customer token value provided by the payment service provider in the authorization response is not included when the order was submitted.

View Write-Off Details, or Enter a Full or Partial Writeoff Amount

At the initial Manage Rejected Deposits page, select **Invoice Details** next to a rejected deposit in the *Rejected Deposits* list, and scroll down to the **Write-Off Details**. If there has already been an amount written off and the deposit has again failed during deposit processing, the previous writeoff amount is displayed.

Write off full or partial amount: Select **Edit** to open the **Write-Off** window. The current *Write-Off to Date* is displayed. Enter the *Write Off Amount* in the format for your currency.

Your entry must be a positive amount and cannot exceed the deposit total. If you enter a write off amount for a credit deposit, your entry cannot exceed the amount of the credit, and decreases the amount of the credit to the customer.

Writeoff update: Regardless of whether the writeoff amount you enter is the same as the rejected deposit total or a lesser amount, the following updates take place when you enter a writeoff amount:

- You return to the Manage Rejected Deposit page, where the deposit has been removed. If the full amount is not written off, the deposit is eligible for processing the next time you process deposits.
- A *Snackbar Notification* opens, displaying a link to view the invoice. Select the link to advance to the *Invoice* page for the Invoice Pay Method.
- The *Deposit created date*, displayed at the *Payment Method Details* panel from the *Invoice* page for the Invoice Pay Method, is set to **888888.**
- The *Adjusted Deposit Amount* displayed at the *Payment Method Details* panel for the invoice is the amount of the writeoff.
- There is an entry for the writeoff at the *Payment Method Details* for the payment method on the order:
  - Under *Transactions*: The status is Written Off. Note that the date is the original Sent Date, and not the date when the writeoff occurred. Also, note that the Amount

displayed is the original amount of the invoice, not the amount remaining on the deposit after the writeoff.

  – Under Activity: The Note displayed is `Writeoff deposit D $12.34`, where `12.34` is the amount written off.

Updates for a partial writeoff after processing deposits:

- The Deposit Adjustment Amount and the Write-Off to Date displayed with the summary data at the *Invoice Details* panel are increased by the writeoff amount, and the Rejected Deposit Amount displayed with the summary data is increased by the writeoff amount.
- A Transaction record displayed at the *Payment Method Details* panel for the order payment method indicates an unconfirmed amount reduced by the amount of the writeoff.
- A new Activity record displayed at the *Payment Method Details* panel for the order payment method indicates an unconfirmed amount that is reduced by the amount of the writeoff.

View Prepaid Payment Details or Apply a Prepayment

At the initial Manage Rejected Deposits page, select **Invoice Details** next to a rejected deposit in the *Rejected Deposits* list, and scroll down to the **Prepaid Payment Details**. Not displayed for a rejected credit deposit.

Apply a prepayment: Select **Edit** to the right of the **Prepaid Payment Details** title to open the **Prepaid Payment** window. At this window, you have the option to change the Payment method to a different cash or check payment type. Then enter a Prepaid amount in order to apply a prepayment to the deposit and reduce the Rejected Deposit Amount. Your entry must be a positive amount.

Updates after applying a prepayment:

- If the prepayment is equal to the current rejected deposit amount, you return to the Manage Rejected Deposit page, where the deposit has been removed. In this case, a *Snackbar Notification* opens, displaying a link to view the invoice. Select the link to advance to the *Invoice* page for the Invoice Pay Method.
- If the prepayment is less than the current rejected deposit amount, you remain at the Invoice Details panel in Manage Rejected Deposits. The *Remaining Amount Due* displayed at the bottom of the panel is updated to remove the entered prepayment amount.
- The *Prepaid to Date* amount is increased by the Prepaid amount entered at the **Prepaid Payment** window.
- The *Deposit Remaining* amount displayed for the Invoice Payment Method at the *Invoice* page is the prepayment amount as a negative amount. For example, if the prepayment amount is 5.00, the Deposit Remaining amount displayed is -5.00.
- The Prepaid Amount displayed at the *Payment Method Details* panel for the invoice is increased by the Prepaid amount entered at the **Prepaid Payment** window.
- Two new **Maintenance** activities are displayed at the *Payment Method Details* panel for the order payment method:
  – One indicates Cash/Check prepaid amount 1.23 where 1.23 is the amount of the prepayment.

– Another indicates Prepaid Pay Method: 0 to 1 where 0 is the code identifying the previous prepayment method and 1 is the selected prepayment method. The previous code is 0 if this is the first prepayment applied to the deposit.

Updates after processing deposits if a partial prepayment was applied:

- If the deposit is rejected again, Total Value of the rejected deposit is reduced by the prepayment amount.
- The Adjusted Deposit Amount displayed at the *Payment Method Details* panel for the invoice is decreased by the Prepaid amount entered at the **Prepaid Payment** window.
- A Transaction record displayed at the *Payment Method Details* panel for the order payment method indicates an amount reduced by the amount of the writeoff.
- If the deposit is rejected again, a new Activity record displayed at the *Payment Method Details* panel for the order payment method indicates an unconfirmed amount that is reduced by the amount of the prepayment.

View or Edit Installment Plan Details

At the initial Manage Rejected Deposits page, select **Invoice Details** next to a rejected deposit in the *Rejected Deposits* list, and scroll down to the **Installment Plan Details**.

Installment Plan Details are displayed only if an installment plan was selected for the order. See *Installment Plan Details* for field descriptions

Select **Edit** to the right of the **Installment Plan Details** title to open the **Installment Plan** window. At this window. you can change the Remaining Installments, Installment Type, or Number of Days Between Installments. See the *Installment Plan Window* for field descriptions.

View Payment Method Details

At the initial Manage Rejected Deposits page, select **Invoice Details** next to a rejected deposit in the *Rejected Deposits* list, and scroll down below the **Payment Information Details** and **Write-Off Details**. See *Payment Method Details* for more information.

View Deposit History

At the initial Manage Rejected Deposits page, select **Invoice Details** next to a rejected deposit in the *Rejected Deposits* list, and scroll down below the **Payment Information Details**, **Write-Off Details**, and **Payment Method Details**. See *Deposit History* for more information.

View Remaining Amount Due and the Release Date

At the initial Manage Rejected Deposits page, select **Invoice Details** next to a rejected deposit in the *Rejected Deposits* list, and scroll down to the end of the page. See *Summary Totals* for more information.

Fields on Manage Rejected Deposits

Purpose: The following information is on the *Manage Rejected Deposits* page.

Initial Page:

- *Filters*
- *Summary Tiles*

- *Rejected Deposits*

Resubmit by Date Range Window

Invoice Details:

- *Heading*
- *Invoice Summary Data*
- *Payment Information Details*
- *Write-Off Details and Write-Off Window*
- *Prepaid Payment Details*
- *Installment Plan Details*
- *Installment Plan Window*
- *Payment Method Details*
- *Deposit History*
- *Confirm Resubmit Window*
- *Summary Totals*

For more information:

- *Manage Rejected Deposits* for an overview of the **Manage Rejected Deposits** page.
- *Manage Rejected Deposits Options* for a description of the options available at the **Manage Rejected Deposits** page.

Initial Page

Filters

- *Reject Date* From: Optionally, enter the earliest reject date to display rejected deposits that were rejected on this date or later.
- *Reject Date* To: Optionally, enter the latest reject date to display rejected deposits that were rejected on this date or earlier.
- *Order Number*: Optionally, enter an order number to display rejected deposits for a specific order. If you enter an order number, entries in any other fields besides the invoice number are ignored.
- Invoice *Number*: Optionally, enter an invoice number to display rejected deposits for a specific invoice. If you enter an invoice number, entries in other filter fields are ignored.
- *Merchant Account*: Optionally, select a merchant account to display rejected deposits for a specific merchant. Merchants are defined through the Work with Authorization Services (WASV) menu option in Classic View. The description of the authorization is displayed, followed by the authorization service code in parentheses.
- *Payment Plan*: Optionally, use this field to display rejected deposits for a type of flexible payment option. Available selections are Deferred, Installment, and Regular, as well as blank to include all. This option is displayed only if the *Use Deferred/Installment Billing (F51)* system control value is selected. Note that when the system control value is selected, all three options are displayed regardless of whether payment plans of each type have been created in your current company.

- *Reject Reason*: Optionally, select a reject reason to display rejected deposits that were rejected with a specific vendor response. If you select a Merchant Account for filtering, only reject reasons that have been used for that Merchant Account are available for selection.

  If there are rejected deposits that were rejected with a vendor response defined for the authorization service through the Work with Vendor Response screen in Work with Authorization Services (WASV), they are displayed as REQUEST CONTAINS INVALID DATA (123) format, where REQUEST CONTAINS INVALID DATA is the description and 123 is the response code. Otherwise, if the response included a reason that is not defined for the authorization service, just the response code is listed.

  Note that all reject reasons used for any rejected deposits in your current company are listed, regardless of whether they were used for the currently displayed rejected deposits. For example, if reject reason 123 was used for a rejected deposit on June 1, and you have filtered the rejected deposits to those displayed on June 2 or later, reject reason 123 is still listed.
- *Total Value From*: Optionally, enter the minimum value to display rejected deposits whose total current values are for that amount or more. You can enter 0.00 in this field to filter credit deposits from the displayed list.
- *Total Value To*: Optionally, enter a maximum value to display rejected deposits whose total current values are for that amount or less. You can enter 0.00 to filter the displayed results to include only credit invoices.

> **Note:**
>
> Note that your filter selections also restrict the totals and amounts displayed in the *Summary Tiles*.

Summary Tiles

- **Time periods:**
  - *All:* Displays current totals for all rejected deposits that match any applied *Filters*
  - *Today*: Displays current totals for all rejected deposits for the current date and that match any applied *Filters*.
  - *Previous 6 Days*: Displays current totals for all rejected deposits for the previous 6 days and that match any applied *Filters*.
  - *7-14* Days: Displays current totals for all rejected deposits that were rejected from 7 to 14 days ago and that match any applied *Filters*.
  - *Over 14 Days*: Displays current totals for all rejected deposits that were rejected more than 14 days ago and that match any applied *Filters*.
- **For each time period:**
  - *Total Value*: The total current value of all rejected deposits for the time period indicated. Includes a two-position decimal. If you have applied any *Filters*, this is the total value for the time period that matches the applied filters.
  - Currency: The *Currency Code* identifying the local currency as defined in the *Local Currency Code (A55)* system control value. If the *Multi Currency by Offer (E03)* system control value is selected, the values of the rejected deposits for orders in a different currency are converted into the local currency.

- *Invoices*: The total number of rejected deposits for the time period. If you have applied any *Filters*, this is the total value for the time period that matches the applied filters.

Rejected Deposits

The list of rejected deposits is below the summary tiles. Rejected deposits are listed by default in chronological order (oldest to newest), although you can change the sort based on any of the below listed fields.

Multiple records for an invoice: If there are rejected deposits for multiple payment methods for an invoice, each payment method is represented by a separate rejected deposit.

- *Reject Date*: The date when the deposit was rejected If it was rejected multiple times, this is the latest date
- Invoice Number, followed by *Order Number* in parentheses.
- *Total Value*: The current amount of the unconfirmed deposit for the card, calculated by subtracting the amount of any prepayment plus any write-offs from the total deposit amount. Positive amounts represent deposits, while negative amounts represent card credits.
- *Reject Reason*: The response code returned by the deposit service. If the code is defined as a vendor response code through Work with Authorization Services (WASV) in Classic View, the info link icon (●) is displayed. You can hover the cursor over this icon to display the description defined for the vendor response code.

Resubmit by Date Range Window

Reject Date Range From: The first reject date to include when resubmitting rejected deposits by date range from the Manage Rejected Deposits page.

Reject Date Range To: The last reject date to include when resubmitting rejected deposits by date range from the Manage Rejected Deposits page.

Reject Reason: The response code returned by the deposit service. Optionally, you can select a specific reject reason to resubmit rejected deposits by date range only when they were rejected with this reason code

If there are rejected deposits that were rejected with a vendor response defined for the authorization service through the Work with Vendor Response screen in Work with Authorization Services (WASV), they are displayed as REQUEST CONTAINS INVALID DATA (123) format, where REQUEST CONTAINS INVALID DATA is the description and 123 is the response code. Otherwise, if the response included a reason that is not defined for the authorization service, just the response code is listed.

Invoice Details

Heading

- *Order Number*
- Invoice Number: A link to open the Invoice page in a new tab.
- *Payment Method*

Invoice Summary Data

- *Invoice Date*

- *Order Number*
- Invoice Number: A link to open the *Invoice* page in a new tab.
- *Invoice Amount*: the original *Invoice Total*, without applying any change resulting from a writeoff, prepayment, or adjustment. The *Currency Code* is displayed to the right.
- *Deposit Adjustment Amount*: Used for deferred or installment billing and also to track writeoff amounts. The amount of the deposit that has been changed or is in transition. The system updates the deposit adjustment amount with this information:
  - written off deposits
  - debit and credit netting amounts
  - deposits pending
- Amount Deposited to Date (*Deposit to Date*): The total amount deposited to date. When a deposit is confirmed, the system updates this field by the deposit amount.

  You have an installment payment plan assigned to the order for 3 installments of $30.00 on the 15th of every month

  The first installment updates this field to $30.00.

  The second installment updates this field to $60.00.

  The third installment updates this field to $90.00.

  When a deposit is confirmed, the system updates this field with the amount deposited.
- *Payment Plan*: The type of pay plan. Can be **Installment** or **Deferred**. Displayed only if the invoice has an associated payment plan.
- *Rejected Deposit Amount*: The current deposit amount that has been rejected by the authorization service. Any writeoff amount or prepayment amount is subtracted from the invoice amount.

Payment Information Details

- *Customer Name*
- Payment Method
- Expiration Date
- Issue Number
- Start Date
- Authorization Number
- Authorization Date
- *Authorization Request Identification*: The transaction ID, or reference number, associated with the authorization transaction for the card payment.

See *Fields on Edit Payment* for information on the fields at the Edit Payment window. Note that the Amount to Charge field is not displayed when you replace the payment method through Manage Rejected Deposits.

Write-Off Details and Write-Off Window

- *Write Off To Date*: The total amount of the deposit that has been written off. See *View Write-Off Details, or Enter a Full or Partial Writeoff Amount*. Display-only.

- *Write Off Amount*: Use this field at the Write-Off window to enter the amount to write off in the format for your currency. Your entry must be a positive amount and cannot exceed the current rejected deposit amount.

  If you enter a write off amount for a credit deposit, your entry decreases the amount of the credit to the customer.

Prepaid Payment Details

- *Payment Method*: Use this field at the Prepaid Payment window to specify the payment method to use when applying the prepayment to the deposit. Only cash or check payment types are available for selection.
- *Prepaid Amount*: The amount to apply against the deposit total. Your entry cannot exceed the current rejected deposit amount.
- *Prepaid to Date*: The prepayment amount that has been added to date to the deposit through the *View Prepaid Payment Details or Apply a Prepayment* option. Display-only.

Not displayed when the rejected deposit is for a negative amount.

Installment Plan Details

Installment plan details are displayed only if an installment plan was selected for the order.

- *Total Installments*: The total number of installments assigned to the invoice payment method.
- *Remaining Installments*: The number of installments remaining. This number is the same as the number of installments when the invoice payment method record is first created and reduces by one each time an installment is sent for deposit.
- *Installment Type*: Indicates how the installment dates are determined. Possible types are **Fixed Day** and **Interval**
- *Number of Days Between Installments*: Indicates the number of days between installments. Displayed only when the Installment Type is set to **Interval**. The system uses this interval number to determine the next deposit release date if you are basing installment dates on intervals, for example, 3 installments in 30 day intervals. The system determines the installment dates based on the order date. For example, if the order date is 09/01/22, the first installment date would be 09/01/22. The system would determine the next installment date by adding 30 days to the first installment date: 09/01/22 + 30 = 10/01/22.
- *Day of Month*: Indicates the day of the month when each installment payment is due. Displayed only when the Installment Type is set to **Fixed Day**.
- *Installment Schedule*: Lists the scheduled deposits for the installment plan.
  - *Amount*: The amount due for the installment
  - *Date*: The date when the installment is eligible for deposit.

Installment Plan Window

- *Total Installments*: The total number of installments assigned to the invoice payment method. Display-only.
- *Remaining Installments*: The number of installments remaining. This number is the same as the number of installments when the invoice payment method record is first created and reduces by one each time an installment is sent for deposit.

Optionally, you can enter a number that is lower than the current remaining number of installments.

- *Installment Type*: Optionally, you can switch between the setting of **Fixed Day** and **Interval**.
- *Number of Days Between Installments*: Optionally, you can enter the number of days between installments. Your entry can be up to 999 days. Displayed and required only when the Installment Type is set to **Interval**.
- *Day of Month*: Optionally, you can enter the day of the month when installment payments are due. If a month is shorter than the specified number of days, the last day of the month is assigned; for example, if your entry is 31, a day of 30 is displayed for September, while other months that include 31 days use a day of 31. Displayed and required only when the Installment Type is set to **Fixed Day**.

Payment Method Details

Indicates the *Invoice Total* for each Charge:

- *Merchandise*
- Prepaid Amount
- *Shipping*
- *Additional Shipping*
- *Additional Charges*
- Personalization (*Personalization (Special Handing) Charge*)
- *Tax*
- *GST*
- *PST*
- *Order Level Shipping*: Total freight charges for the shipment.
- *Order Level Shipping Tax*: Total tax on freight for the shipment.
- *Adjusted Deposit Amount*: The total deposit amount, calculated as the invoice amount minus any writeoff amount. Not reduced by a prepayment until after processing deposits. Not reduced for a writeoff.

Deposit History

For each deposit history record, includes the following:

- *Deposit Created Date*
- *Deposit Remaining* Amount
- *Payment Method* description, followed by the last four digits of the credit card number displays after the payment method description in parenthesis if this is a credit card. For example: VISA (1234). This is the CC Last 4 from the Order Payment Method table.
- *Deposit Status*

Select **>** next to the deposit history record to display the following:

- *Transaction Type*: A *Payment Transaction Type* of Deposit - Purchase or Deposit - Return.
- *Authorization Transaction Number*: The transaction ID, or reference number, associated with the authorization transaction for the card payment.

- *Authorization Code*: The authorization code sent with this deposit. This code indicates that the amount to charge for this card has been authorized manually or through a card authorization service.
- *Action Code*: Possible action codes:
  - Authorize and Deposit: The deposit requires an authorization before it can be processed. The system sends this code for
    - all payment plan deposits except for the first deposit of an installment plan, when a code of Deposit is sent.
    - any regular (non-pay plan) deposit whose authorization has expired.
  - Deposit: The deposit does not require authorization and can be processed. The system sends this code for all regular deposits, assuming there is an authorization number in the Invoice Pay Method table and the authorization has not expired. If there is no authorization number, the system sends a code of Authorize and Deposit.
  - Return: The deposit is for a credit.
- *Merchant Account*: The description of the authorization service, followed by the 3-position code in parentheses.
- *Deposit Amount*: The amount sent to be deposited. The system uses this calculation to determine the amount to deposit:
  - **For deferred payment plans:** `prepaid amount - adjustment amount - total amount deposited to date = deposit amount`
  - **For installment payment plans:** `prepaid amount - adjustment amount - total amount deposited to date / intervals remaining = deposit amount`
  - **For regular invoices:** `rejected deposit amount - writeoff amount = deposit amount`
- *Billing Method:* Indicates whether this deposit is related to a deferred or installment payment plan. Valid values:
  - **Regular** = This is a regular deposit; no payment plans are associated with this deposit.
  - **Deferred** = This is a deferred billing deposit.
  - **Installment** = This is an installment billing deposit.
- *Expiration Date*: The date the card is no longer active. The expiration date may be zero, depending on the configuration of the pay type. For example, a stored value card credit card type typically does not require an expiration date.
- Response Code (*Authorization Response*): A code assigned by the authorization service that identifies whether the card deposit was authorized and approved or declined, and the reason for the authorization decline. Set to (undefined) if the response code is not defined for the authorization service in Work with Authorization Services (WASV).

Confirm Resubmit Window

The following fields are displayed only when you select Resubmit from the *Invoice Details* panel.

- Payment *Expiration Date*. If the expiration date has passed, you can use the **Edit Expiration Date** option to update it before you can resubmit. This window displays the payment method, last 4 positions of the credit card number, and the current expiration date in MM/YY format. See *Edit the Expiration Date for a Payment Method*.
- Release Date: The *Deposit Release Date*.

Summary Totals

The following fields are displayed at the bottom of the Invoice Details page.

- *Remaining Amount Due*: The amount still due on the rejected deposit.
- *Release Date*: The date when the deposit is eligible for processing. Deferred or installment pay plans typically have a deposit release date (or dates) later than the invoice date. Regular (non-pay plan) invoices have a deposit release date that is the same as the invoice date.

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Check Gift Card Balance

Overview: Use the **Check Gift Card Balance** page or window to inquire on the amount remaining on a gift card.

Both the page and the window display the same fields and provide the same options.

How to display:

- **Check Gift Card Balance page:** Select the **Check Gift Card Balance** option through a menu, such as the Order Entry menu, or from the *Home* page.
- **Check Gift Card Balance window:**
  - Select the **Check Gift Card Balance** option for a gift card payment in the *Payment Information Panel* of the *Order Summary* page.
  - Select the **Check Gift Card Balance** option for a gift card payment on the *Add Payment* window.
  - Select the **Check Gift Card Balance** option for a gift card payment on the *Edit Payment* window.

> **Note:**
>
> The **Check Gift Card Balance** option is available only if you have authority to the **Stored Value Card Balance Inquiry (MSVB)** menu option.

For more information:

- *Check Gift Card Balance Options* for step-by-step instructions on the actions you can perform on the **Check Gift Card Balance** page or window.
- *Fields on Check Gift Card Balance* for a description of the fields on the **Check Gift Card Balance** page or window.

Check Gift Card Balance Options

Purpose: You can perform the following actions on the **Check Gift Card Balance** page or window.

- *Send Balance Inquiry Request*

For more information:

- *Check Gift Card Balance* for an overview of the **Check Gift Card Balance** page or window.
- *Fields on Check Gift Card Balance* for a description of the fields on the **Check Gift Card Balance** page or window.

Send Balance Inquiry Request

1. Select a gift card payment method from the *Payment Method* drop down field.
2. Enter a valid gift card number in the *Card Number* field.
3. If the gift card is assigned an ID number, enter the ID in the *Card ID Number* field.
4. Select the **Check Gift Card Balance** option. The system validates your entries. An error message displays if:
   - The card number is blank.
   - The card number does not match the length defined in the **Credit Card Length** field for the payment in the **Work with Pay Types (WPAY)** menu option.
   - The card number does not pass the modulus check validation defined in the **Modulus Check** field for the payment in the **Work with Pay Types (WPAY)** menu option.
   - The leading digits of the card number do not match the leading digits defined in the **Leading Digits** field for the payment in the **Work with Pay Types (WPAY)** menu option.
5. The system looks at the *Authorization Service* field defined for the gift card pay type to determine the service bureau that performs balance inquiries for the gift card pay type. An error message displays if an authorization service is not defined for the payment in the **Work with Pay Types (WPAY)** menu option.
6. The system sends a balance inquiry request to the service bureau.
7. If the response returns an error, the system displays an error message at the top of the page or window.
   - If the vendor response returned matches a vendor response in the CC Vendor Response table, the system displays the message defined for the vendor response.
   - If the vendor response returned does not match a vendor response in the CC Vendor Response table, the system displays a message indicating the vendor response is not recognized and provides the error returned in the balance inquiry response.
   - If a response is not received from the service bureau, the system displays a message indicating the balance inquiry could not be performed.
8. If the response includes the card balance amount, the system displays the *Card Balance* at the bottom of the page or window.

Fields on Check Gift Card Balance

Purpose: The following information displays if you select the **Check Gift Card Balance** option from the *Add Payment* window or if you select the Check Gift Card Balance option through a menu, such as the Order Entry menu. This information is already defined if you select the **Check Gift Card Balance** option for a gift card payment on the *Order Summary* page or from the *Edit Payment* window.

- *Payment Method*
- *Card Number*

- *Card ID Number*

The following fields related to the response display only if the balance amount is received in the response from the gift card service.

- *Last 4 Digits of Payment Card*
- *Card Balance*

For more information:

- *Check Gift Card Balance* for an overview of the **Check Gift Card Balance** page or window.
- *Check Gift Card Balance Options* for step-by-step instructions on the actions you can perform on the **Check Gift Card Balance** page or window.

66 Batch Job Statistics

Overview: Use the **Batch Job Statistics** page to review the current status and totals for various batch jobs submitted in Order Administration.

You can refresh the data on this page by selecting **Generate Results** in order to check the progress of processed records.

How to display: Select Batch Job Statistics from a menu.

Required authority: To advance to this page, you need full (not **Display**) authority to the DBJS menu option. See **Setting Up Menu Options (WOPT)** in the Classic View online help for background.

Statistics available for review: You can review totals by status for the following activities:

- **Authorizations:** Credit Card Authorization records for the current company.
- **Billing Data Queue:** Billing Header Data Queue records across all companies.
- **Deposits:** Credit Card Deposit Transaction records for the current company.
- **Item Upload:** Retail Item Upload records for the current company.
- **Order Broker Lines:** Order Orchestration records representing all order lines sent to or received from the Order Broker for shipment or customer pickup, including brokered backorders, pickup orders, ship-for-pickup orders, delivery orders, or retail pickup orders, as well as fulfilling orders created to fulfill an order that originated in Order Administration, if the *Use OROB for Fulfillment Assignment (M31)* system control value is selected.

  You can use this information to verify that status changes are taking place, indicating that the integration with Order Orchestration is active. For example, if you click Refresh on this screen and do not see any status changes at all, that may indicate that the BROKER or BROKER_ORD jobs are not active, or something is not right with the integration.

  Some statuses apply only temporarily. For example, you might expect to see changes in Acknowledged or Ready status, and Canceled statuses increase but not decrease.
- **Picks Generated:** Pick Control Header records, broken out by billing batch number, for the current company.

Refreshing information: Select Generate Results each time you would like to refresh the currently displayed totals.

For more information:

- *Batch Job Statistics Options* for step-by-step instructions on the actions you can perform on the **Batch Job Statistics** page.
- *Fields on Batch Job Statistics* for a description of the fields on the **Batch Job Statistics** page.

Batch Job Statistics Options

Purpose: You can perform the following actions on the **Batch Job Statistics** page.

- Display current statistics for a batch job:
  - Select the job from the *Batch Job Type* drop-down.
  - Select **Generate Results**.
- Refresh the currently displayed statistics for a batch job: Without selecting a different *Batch Job Type*, select **Generate Results** again.

For more information:

- *Batch Job Statistics* for an overview of the **Batch Job Statistics** page.
- *Fields on Batch Job Statistics* for a description of the fields on the **Batch Job Statistics** page for each of the batch job types.

Fields on Batch Job Statistics

Purpose: The following fields display on the **Batch Job Statistics** page.

- *Batch Job Type*: Use this field to select the job statistics to review and then select **Generate Results**.
- **Authorizations:** Credit Card Authorization records for the current company.
  - *Authorization Service* Code: The code identifying the authorization service, as set up through Work with Authorization Services in the Classic View of Order Administration.
  - *Status*: Possible statuses are:
    - ***DCLD**: Declined.
    - ***RDY**: Ready to be sent, or re-sent, to the authorization service.
    - ***RCVD**: Response has been received from the authorization service.
    - ***SENT**: Sent to the authorization service, but no response received yet.
  - *Count*: The total number of authorization records for the authorization service in the indicated status.

  For more information, see **Using the Credit Card Authorization Interface** in the Classic View online help.
- **Billing Data Queue:** Billing Header Data Queue records across all companies, automatically submitted to the BILL_ASYNC background job for processing updates related to a credit or debit invoice.
  - *Status*:
    - blank: Not yet processed.
    - **A**: Detail updates.
    - **H**: Misc history updates.
    - **Z**: All updates complete.
  - *Count*: The total number of records, across all companies, in the indicated status.

  For more information, see **Working with the BILL_ASYNC Job** in the Classic View online help.
- **Deposits:** Credit Card Deposit Transaction records for the current company.

  - *Authorization Service* Code: The code identifying the authorization service, as set up through Work with Authorization Services in the Classic View of Order Administration.
  - *Status*: Possible statuses are:
    - ***DCLD**: Declined.
    - ***RDY**: Ready to be sent, or re-sent, to the authorization service.
    - ***RCVD**: Response has been received from the authorization service.
    - ***SENT**: Sent to the authorization service, but no response received yet.
- *Count*: The total number of Credit Card Deposit Transaction records for the current company.

  For more information, see **Using the Credit Card Authorization Interface** in the Classic View online help.
- **Item Upload**: Retail Item Upload records for the current company.
  - *Status*: Possible statuses are:
    - B: Batch Selected. The system is processing upload records of this type.
    - D: Delete Pending. The system will delete the record from the table.
    - **E**: Error. The record has failed the processing edits.
    - **I**: In Process. The record is in the batch of records currently being processed.
    - **P**: Processed. The record has been processed but not yet deleted.
    - **S**: Other Updates. The record is being processed by the secondary RISECU job, which creates item download trigger records.
    - **U** or blank: Unprocessed. The record is waiting to be processed.
  - *Count*

  For more information, see **Working with Retail Integration Item Upload (RIIU)** in the Classic View online help.
- **Order Broker Lines:** Order lines in the Order Orchestration table, representing all order lines sent to or received from the Order Broker for shipment or customer pickup.

  Totals include both originating and fulfilling orders: If the *Use OROB for Fulfillment Assignment (M31)* system control value is selected, both the originating order submitted to Order Orchestration and the fulfilling order assigned in Order Administration to fulfill it are included in these totals.

  Example: Order 12345 was submitted to Order Orchestration for assignment, and Order Orchestration submitted the order to Order Administration to fulfill from the warehouse. Order Administration created order 12346 to fulfill order 12345. Lines from both order 12345 and 12346 are included in the totals for their respective statuses.
  - *Status*: Possible statuses are:
    - **A: Accepted.** The location assigned to fulfill the order line has accepted it, or has accepted the order and is preparing it for shipment or pickup. Possible order types: brokered backorder (delivery or ship-for-pickup) or store pickup.
    - **C: Closed.** You canceled the request when its status was **R** (Ready), before it was submitted to Order Orchestration. Possible order types: brokered backorder (delivery or ship-for-pickup).
    - **E: Error.** Order Orchestration has returned an error response. Can apply to any order type.

* **F: Picking.** The pick slip has been printed. Possible order types: retail pickup, delivery, or ship-for-pickup (pick gen/drop ship).
* **I: In Process.** The order line was received from Order Orchestration and created without error. Possible order types: retail pickup or delivery.
* **J: Rejected.** The order line was sold out after creation in Order Administration. Order Orchestration may have reassigned the order to another fulfilling location. Possible order types: retail pickup or delivery.
* **K: Acknowledged.** Order Orchestration has received the order line request, assigned a request ID, selected a fulfilling location (brokered backorder), and created the order in its database. Possible order types: brokered backorder (delivery or ship-for-pickup) or store pickup.
* **N: New.** The order line was received from Order Orchestration but is in error. Possible order types: retail pickup or delivery.
* **O: Posted.** Order Orchestration has submitted the order line for enterprise fulfillment. See **Enterprise Order Integration (Future Receipts and Pre-Order Processing)** in the Classic View online help for background. Possible order types: brokered backorder, store pickup, or ship-for-pickup.
* **P: Polled.** The assigned fulfilling location has polled Order Orchestration for new orders and been notified of this order line. Possible order types: brokered backorder (delivery or ship-for-pickup) or store pickup.
* **R: Ready**. In the case of a brokered backorder, the request is ready to be sent to Order Orchestration, but the BROKER process has not yet generated the request message. In the case of a store pickup or ship-for-pickup, Order Administration attempted to send the order to Order Orchestration, but Order Orchestration has not responded. In this case, Order Administration retains the order information in the Store Pickup tables until communication with Order Orchestration resumes. Possible order types: brokered backorder (delivery or ship-for-pickup), store pickup.
* **S: Received by Store.** The order line has been received by the store location but not yet picked up by the customer. Possible order types: brokered backorder (ship-for-pickup), retail pickup, or ship-for-pickup (pick gen/drop ship).
* **T: In Transit**. The location fulfilling the order line has shipped the merchandise to the store for pickup. brokered backorder (ship-for-pickup), retail pickup or ship-for-pickup (pick gen/drop ship).
* **U: Unfulfillable.** Order Orchestration has not found a location able to fulfill the order line based on the rules set up in Order Orchestration; or the assigned fulfilling location has rejected the order line, and it cannot be reassigned to another location. Possible order types: brokered backorder (delivery or ship-for-pickup) or store pickup.
* **V: Intransit Polled.** The pickup location for a ship-for-pickup order line has received the order line in the intransit response message, if the system is not flagged to Require Status Update; or, has sent a status update request changing the status to intransit polled. Possible order types: brokered backorder (ship-for-pickup), retail pickup or ship-for-pickup (pick gen/drop ship).
* **W: Waiting.** The order request message has been sent to Order Orchestration, but Order Administration has not yet received a response. Possible order types: brokered backorder (delivery or ship-for-pickup).

        * **X: Completed.** The order line has been fulfilled. All order types.
        * **Y: Pending Cancel.** You have canceled the order line or voided the pick slip, but Order Orchestration has not yet confirmed. All order types.
        * **Z: Canceled.** The cancellation has been confirmed. All order types.
    – *Count*

    For more information, see **Order Orchestration Integration** and **Working with Order Broker (WOBR)** in the Classic View online help.

- **Picks Generated:** Pick Control Header records, broken out by billing batch number, for the current company.
    – *Billing Batch Number*: The number identifying a group of generated pick slips.

    > **Note:**
    >
    > Drop ship pick slips have a billing batch number of 0.

    – *Status*: Possible pick slip statuses include:
        * **1**: Pre-Auth
        * **2**: Authorized
        * **A**: Submitted to Asynchronous Processing
        * **B**: Billing Pending
        * **C**: Confirmed. The pick slip has been confirmed as shipped.
        * blank: Open
        * **D**: Declined authorization.
        * **E**: Async Processing Error.
        * **G**: Generated No Authorization. The pick slip has been pre-generated.
        * **H**: Generated Has Authorization. The pick slip has been pre-generated, and has been authorized.
        * **M**: Manifest Submission
        * **O**: Carryover
        * **P**: Packed. The pick slip has been confirmed as packed through Pick/Pack Verification.
        * **R**: Reprinted
        * **S**: Suspended
        * **V**: Void
        * **W**: Waiting for Authorization
        * **Z**: Authorized.
    – *Count*: The total number of pick slips in the indicated billing batch and status.

For more information, see **Performing Pick Slip Generation** in the Classic View online help.

For more information: For more information on Batch Job Statistics, see:

- *Batch Job Statistics* for an overview of the **Batch Job Statistics** page.
- *Batch Job Statistics Options* for step-by-step instructions on the actions you can perform on the **Batch Job Statistics** page.

67
Unlock Order

Overview: Use the **Unlock Order** page to unlock a stranded order so that you can work with it.

Why are orders locked? Order Administration locks an order when a user or process is working with the order, so that another user or process cannot update the order at the same time.

What does the lock consist of? When a user is entering an order or selects an order for maintenance, or when a function is updating an order, Order Administration locks the order by entering the user's login ID or the function name in the User field in the Order Header table.

How does an order become stranded? Typically, an order becomes stranded when a user is working with it and the session ends unexpectedly, such as when the workstation shuts down. In this situation, the system does not have an opportunity to clear the user ID from the order record. Similarly, an order can become stranded if a process that is currently updating the record ends abnormally.

How can you tell when an order is locked? You can tell that an order is locked if the message Order Locked for Editing (USERNAME). This message indicates the name of the user or process locking the order, based on the current entry in the User field in the Order Header table.

You cannot use this option to unlock an order when it is locked by billing or pick slip generation (PICKGEN). Also, you cannot unlock an order in suspended status.

When all pay types are deactivated for an order, you cannot unlock the order. You must enter a valid pay type to release the order from hold, or cancel the order. If you try to edit the order and a valid pay type is not entered, you should close the browser then use the Unlock Order (MULO) menu option to unlock the order.

Error orders For an order in error status, the **Unlock Order** button in the MV Order Summary screen triggers the Edit Batch program for that single order when that order is in:

- Error status at the Order Header level.
- An error order batch.

.

It will not run the edit across all orders in that error batch or generate any Edit Batch reports. If all existing errors are fixed and there are no new errors introduced, after the Edit Batch process is run, the order will be:

- Unlocked and moved into Open (or held) status and
- Run through all the normal processes that the edit batch process triggers, such as: pre-picks, Async and so on.

If one or more existing errors remain or new errors get created, after the Edit Batch process is run, the order will be Unlocked and remain in Error status in the error batch.

Order Activity messages are written for an error order every time the order is Unlocked in MV Order Summary.

How to display: Select Unlock Order from a menu.

Required authority: To advance to this page, you need ALLOW or DISPLAY authority to the MULO menu option. See **Setting Up Menu Options (WOPT)** in the Classic View online help for background.

For more information:

- *Unlock Order Options* for step-by-step instructions to unlock an order at the Unlock Order page.
- *Fields on Unlock Order* for a description of the fields on the **Unlock Order** page.

Unlock Order Options

Purpose: You can perform the following actions on the **Unlock Order** page.

Determine if an order is locked: Enter the *Order Number* that you would like to unlock and select the **Search** option.

If the order number is valid, the page:

- Displays an error message above the *Order Number* if the order is not currently locked.
- Regardless of whether the order is locked, displays information about the selected order below the *Order Number*. See the **Results Fields** at the *Fields on Unlock Order* for details.

Otherwise, if the order number is not valid, the page displays an error.

Unlock the order: If the order is currently locked, the **Unlock Order** option is available below the results fields.

- Select the **Unlock Order** option.
- The **Confirm Unlock** window opens, confirming the order number that will be unlocked. Select **Ok** to unlock the order.

For more information:

- *Unlock Order* for an overview of the **Unlock Order** page.
- *Fields on Unlock Order* for a description of the fields on the **Unlock Order** page.

Fields on Unlock Order

The following fields are on the **Unlock Order** page.

Entry field: Enter the *Order Number* that you would like to unlock.

Result fields: After you enter a valid order number, the following information is displayed:

- *Order Number*: The order number that you entered.
- *Order Status*
- *Order Date*

- Date Entered: The *Entered Date*.
- *Order Source*
- *Entered By*
- *Locked by User*
- *Customer Name*: The customer who placed the order. The *Customer Number* is also indicated in parentheses.

For more information: For more information on unlocking orders, see:

- *Unlock Order* for an overview of the **Unlock Order** page.
- *Unlock Order Options* for step-by-step instructions on unlocking an order.

68 Modern View Order Error Handling

Orders in an Error status, with a batch number associated, can now be deleted, edited for corrections, and resubmitted for processing through Modern View Order Summary. All order types allow editing if in an error batch.

> **Note:**
>
> Edit and delete actions are performed immediately upon confirming. Only when Unlock Order is clicked will the order be re-validated to remove individual errors.
>
> A user must have ALLOW authority to the *Allow Edit or Delete of Error Orders in Modern View (J11)* secured feature, otherwise orders in an error batch are display-only.

A complete list of errors associated to the order can be viewed by clicking Error Details on the Order Summary tab. Each error type will identify a source for the specific level of error: Order, Ship-To Number or Ship-To Number and Line Number.

Errored orders can be reviewed and interactively worked through to fix the errors one by one.

- The single order can then be resubmitted or unlocked to re-validate for errors and if none, continue the order process and move to an Open status or refresh the error list.
  - The Edit/Accept Order Error Batch process in Classic View will also perform the edits.
- Multiple fields were enhanced to allow edits to be made within error orders.
- During unlock or resubmit, Order Administration will remove all applied promotions from the order and perform a reprice evaluation.
  - When ORPE is enabled, repricing logic will update pricing and only send orders with the already_eval_by_promo_engine=N to be re-evaluated by ORPE.
  - When ORPE is not enabled, repricing logic will update pricing and re-evaluate Order Administration promotions/discounting.
- An entire order, individual ship-to (when more than one exists), or individual item line can be deleted and re-keyed to correct an error.
- Data either missing or invalid in Order Administration but set from an external system is visible within the Order screens but must be changed to a valid selection to correct the error.

Shipping Address Error Considerations

When correcting orders with shipping address errors, the type of ship-to address assigned during initial creation of the order will determine where to correct the data.

- When the ship to type is Address Book or Recipient Ship To, the ship-to type will be converted to a one-time ship to during the submit process. Errors may continue to persist and will need to be corrected on the Recipient Customer record or in the Customer Address Book record directly. Once corrected, the order in error can be resubmitted.

> **Note:**
>
> The use of a different sold-to customer as a recipient (ship-to) on an order, also known as a recipient customer sold-to, has been deprecated and should be discontinued for new order creation options, including Modern View Order Entry and web services.

- When the Ship-to is the same as the Primary Address (Sold To), the address error can be corrected by editing either the Ship-To or the Sold To within Modern View. Select the edit icon, make the change to correct the address issue, and then unlock the order once complete.
- When the Ship-to is a One Time Ship To (order level), address errors can be corrected by editing the Ship-To within Modern View. Select the edit icon, make the change to correct the address issue, and then unlock the order once complete. The order will have been updated to an Open status.

69 Manage External Application Access

Purpose: Use the **Manage External Application Access** page to create, review, and work with external applications that integrate with Order Administration using OAuth, and define the web services that use OAuth authentication for inbound web service requests to Order Administration.

About OAuth: OAuth enables web service communication between applications using a token provided by IDCS or OCI IAM rather than a password, providing greater security. The requesting application first passes its:

- **Client ID:** Similar to a user ID in that it identifies a client application to the authentication service, in this case IDCS or OCI IAM. You can create client IDs through the **Manage External Application Access** page, in IDCS or OCI IAM, or through other applications, such as Customer Engagement.
- **Client secret**: A secure code that IDCS or OCI IAM creates for a client application, and that the client application passes to IDCS or OCI IAM for authentication. The client secret should be known only to the requesting application and to IDCS or OCI IAM.

When IDCS or OCI IAM receives the valid client ID and client secret, it then provides the token to the requesting application. The requesting application can then include the token in the web service request to the destination system, which validates the token with IDCS or OCI IAM.

For example, if your ecommerce system will communicate with Order Administration using OAuth, you can use this page to:

- Create a client ID and secret, which you can then provide to the ecommerce system.
- Create the associated web service authentication records for the ecommerce system.

With OAuth authentication:

The requesting system first passes a client ID and a client secret to an authenticating service, such as IDCS or OCI IAM.

- The authenticating service, such as IDCS or OCI IAM, generates a short-lived token.
- The requesting system submits the token to the destination system, rather than a password and user ID as with basic authentication.
- The destination system validates the token and client ID.

The following is required in order to support OAuth with Omnichannel products:

- The IDCS or OCI IAM client ID and client secret for the integrating system must be created through an Omnichannel cloud service, if it does not already exist.
- The system receiving the web service request needs to have a record of the client ID with assigned access for the web service API.
- A system sending the web service request needs to be able to request the token from IDCS or OCI IAM.
- The system sending the web service request needs to include the token so the system receiving the web service request can validate the request.

About store locations and XOffice OnPrem: The XOffice OnPrem application differs from other applications in that it serves as the parent for any related store locations. Any store locations that are assigned a parent ID are not displayed at this page; instead, you configure external access for XOffice OnPrem, and this “parent” handles authentication for all related store locations.

When authentication is required for a request originating from any location associated with the XOffice OnPrem parent ID, the parent ID’s authentication credentials are used.

Example: XOffice OnPrem is the parent for location A.

For more information: See the **Oracle Retail Omnichannel Web Service Authentication Configuration Guide** on My Oracle Support (2728265.1) for web service authentication configuration instructions.

> **Note:**
>
> This option is delivered with the default SYSADMIN menu but is currently used only for Order Administration Cloud Service, so authority to the option is not normally required by any users.

How to display: Select **Manage External Application Access** from a menu.

> **Note:**
>
> ALLOW authority to the MEAA menu option is required for access to this page.

For more information:

- *Manage External Application Access Options* for step-by-step instructions on the actions you can perform on the **Manage External Application Access** page.
- *Fields on Manage External Application Access* for a description of the fields on the **Manage External Application Access** page.

Manage External Application Access Options

Purpose: The options at the **Manage External Application Access** page are described below.

Troubleshooting: Options at this page that require communication with IDCS or OCI IAM, including generating a new client, regenerating the secret for a client, and refreshing the displayed applications, will fail if the administrative properties listed above are not set correctly. See **Work with Admin Properties** in the Classic View online help for more information on setting up these properties, or contact your Oracle representative for more help.

For more information:

- *Manage External Application Access* for an overview of the **Manage External Application Access** page.

- *Fields on Manage External Application Access* for a description of the fields on the **Manage External Application Access** page.

Also, see the **Oracle Retail Omnichannel Web Service Authentication Configuration Guide** on My Oracle Support (2728265.1) for web service authentication configuration instructions.

Options at this page:

- *Filter the Displayed External Application Access Options*
- *Generate a New Client*
- *Refresh the Displayed Applications*
- *Edit Web Service Access for an Application*
- *Regenerate the Secret for a Client*

Filter the Displayed External Application Access Options

To filter the displayed records: Enter any string of characters in the **Filter** field and press **Enter** to restrict the displayed records to those that:

- Contain your entry in the description or client ID of the external application, or
- Have web service authentication records for a web services matching your entry; for instance, enter cwc or CWC to display applications with web service authentication records for the CWCustomer web service.

The filter is not case-sensitive.

Filter on more than one string of characters: You can also enter an additional string of characters in the **Filter** field and press **Enter** to restrict the displayed records to those that contain all entered search criteria.

Example: Enter `new` and press **Enter** to display external application records whose descriptions contain the word or string `new`. Enter `demo` and press **Enter** to display external application records that contain both the word or string `new` and the word or string **demo**.

You can remove any search criteria by clicking the X to the right of the search term. The page updates the filtered results immediately.

Sorting: You can also click on a column heading to sort the results in ascending or descending order based on the selected column.

> **Note:**
>
> External applications that were generated through Customer Engagement Cloud Services have a blank **Application Description**. Search for them by using the **Client ID**.

Generate a New Client

About generating new clients: Typically, you would use the **Manage External Application Access** page to:

- Generate a new client for the XOffice On Premises application and assign web service access.

- Generate a new client for another application and assign web service access.

Before you start: Before beginning the generation steps, you would typically select the Refresh option to confirm that the required client applications were not already created. See *Refresh the Displayed Applications*.

If the required client applications are not displayed after you select Refresh, follow the steps below to create them.

Generation steps: Select the **Generate Client** option to advance to the **Generate Application Client** window.

At this window, specify the **Application Details**:

- **Application Type:** Can be either:
- **XOffice On Prem**: Select this option only if the application does not integrate directly with IDCS or OCI IAM.
- **External**: Select this option if the application integrates with IDCS or OCI IAM.

Selecting an **Application Type** is required.

Application Description: Enter a brief description of the application. This is the **Description** in IDCS or OCI IAM, and is informational. If you require multiple environments, such as one for production and one for UAT, you can include this information in the application description. Alphanumeric, 50 positions; required.**Environment:** If the **Application Type** is **XOffice On Prem**, specify the type of environment, such as PROD or TEST. Your entry is converted to upper case, and no spaces or special characters are allowed. Required if the **Application Type** is **XOffice On Prem**; otherwise, if you set the **Application Type** to **External**, this field is not enterable and is not used. Informational.

Click **Generate** to save the generate the new client and submit it to IDCS or OCI IAM; otherwise, click the **X** in the top right to close the window without generating the client.

If you click **Generate**, the window displays:

- The new generated **Client ID**, and a link to copy the Client ID to the clipboard.
- A link to copy the generated **Client Secret** to the clipboard.

You can copy and paste the new client ID and the new client secret if you need to share the information for an application that is not integrated with IDCS or OCI IAM, so that application can use the secret for OAuth authentication.

The window displays an error if it cannot create the client, such as if the client ID already exists, or if communication with IDCS or OCI IAM fails. See *Manage External Application Access* for information on the properties used for communication with IDCS or OCI IAM.

Click **Done** to close the window, and click **OK** at the confirmation window to confirm.

Generated client ID:

- When the **Application Type** is **XOffice On Prem**, the generated client ID is RGBU_XTROFFOP_<ENV>_XOFFICE_APPID, where <ENV> is the specified Environment.
- When the **Application Type** is **External**, the generated client ID is RGBU_OMCS_<RANDOM>_APPID, where <RANDOM> is a random string of 8 characters.

Define web service access: After creating the client, you need to define web service access. See *Edit Web Service Access for an Application*.

For more information: See *Manage External Application Access* for background.

Edit Web Service Access for an Application

To edit access: To create, change, or review web service authentication user records for the external application, highlight a record and select **Edit Access** from the right-hand **Actions** column (⋮). The **Web Services for** window opens.

Select or deselect any of the listed web services. The standard Order Administration web service options are:

- CWCustomer:
- CWEmailRequest
- CWMessageIn
- CWOrderIn
- CWPickIn
- CWReceiptIn
- CWServiceIn
- JMSQueue
- JobStatistics
- PrivateDataRequest
- ProcessIn
- Storage

For more information: See the Classic View online help for information on each of these web services.

Click **OK** to update the web service access; otherwise, click **Cancel**.

Create web service access: Once created, the inbound web service records are listed in the **Web Service Access** column at the **Manage External Application Access** page, and are also displayed at the Work with Inbound Web Service Authentication Users through the Work with Web Service Authentication (WWSA) menu option, with the **User** set to the *Client ID*. The client ID can now be used for OAuth authentication for that web service.

Delete web service access: If you delete the web service option, the inbound web service authentication record is deleted, and is no longer displayed at the at the Work with Inbound Web Service Authentication Users through the Work with Web Service Authentication (WWSA) menu option, and can no longer be used for authentication for that web service.

Typical required access: The following web service access is typically required:

- **XOffice On Prem**: Requires CWOrderIn, CWServiceIn, and CWMessageIn.
- **Ecommerce application:** Requires CWOrderIn.

Refresh the Displayed Applications

To refresh: Click **Refresh** to update the list of currently existing application clients from IDCS or OCI IAM:

- If any additional application clients are found in IDCS or OCI IAM that did not previously have records in Order Administration, these application client records are created in the Order Administration database.
- If any application clients that previously existed in Order Administration have been deleted from IDCS or OCI IAM, they are deleted from Order Administration, and the web service authentication user records are also removed from Web Service Authentication (WWSA).

Example: When you click Refresh, the updated list of clients might include clients created through another application, such as Customer Engagement.

> **Note:**
>
> When additional store locations have been created for XOffice On Prem, using the Refresh option creates the records in the Order Administration database; however, these records are not displayed at the **Manage External Application Access** page because they are assigned to XOffice On Prem as their parent ID. The **Manage External Application Access** does not display any records whose parent ID is populated.

Regenerate the Secret for a Client

To regenerate: Highlight a record and select **Regenerate Secret** from the right-hand **Actions** column (⋮). This option is available only if:

- The application record was created in Order Administration, and
- The selected **Application Type** is External.

The Regenerate Application Client Secret window displays the following information:

- The selected Client ID.
- The Application Description.
- The Application Type (External).
- The Environment, such as QA or PROD, if specified when the application was created.

All fields are display-only.

About the client secret: The client secret is a secure code that IDCS or OCI IAM creates for a client application, and that the client application passes to IDCS or OCI IAM for authentication. The client secret should be known only to the requesting application and to IDCS or OCI IAM.

You can close the window by clicking the **X** in the upper right.

If you click **Regenerate Secret**, the **Confirm Client Secret Regeneration** window opens.

Click **OK** to regenerate the secret. The window displays:

- The new **Client ID**, and a link to copy the new client ID to the clipboard.
- A link to copy the new client secret to the clipboard.

You can copy and paste the new Client ID and the new client secret if you need to share the information for an application that is not integrated with IDCS or OCI IAM, and needs to use the client ID and client secret for OAuth authentication.

Use caution when regenerating the secret, since this option actually deletes the application client in IDCS or OCI IAM and regenerates it.

The window displays an error if it cannot regenerate the secret, such as if communication with IDCS or OCI IAM fails. See *Manage External Application Access* for information on the properties used for communication with IDCS.

For more information: See *Manage External Application Access* for background.

Fields on Manage External Application Access

Purpose: The following information is on the **Manage External Application Access** page.

- **Application Description:** The description of the application created for web service authentication. This is the **Description** in IDCS or OCI IAM. Alphanumeric, 50 positions. Display-only.

> **Note:**
>
> External applications that were generated through Customer Engagement Cloud Services have a blank application description.

- **Client ID:** Uniquely identifies the client in IDCS or OCI IAM:

If the **Application Type** is **XOffice OnPrem**, the client ID is RGBU_XTROFFOP_ <ENV>_XOFFICE_APPID, where <ENV> is the environment, such as PROD for production.

If the application record was created through Order Administration or another Omnichannel Application, the client ID is formatted as RGBU_OMCS_<RANDOM>_APPID, where OMCS identifies the application, and <RANDOM> is a series of 8 random characters.

Otherwise, if the application record was created in IDCS or OCI IAM, the client ID is a series of random characters.

This is the **Name** in IDCS or OCI IAM. Note that the **Display Name** in IDCS or OCI IAM is the Client ID without the _APPID suffix.

Alphanumeric, 255 positions. Display-only.

> **Note:**
>
> The client ID is similar to a user ID in that it identifies a client application to the authentication service, in this case IDCS or OCI IAM. You can create client IDs through the **Manage External Application Access** page, in IDCS in OCI IAM, or through other applications, such as Customer Engagement.

- **Web Service Access:** The Order Administration inbound web services for which the application is defined as a user. You can use the **Edit Access** option at the *Manage*

External Application Access page to create, delete, or review the inbound web services for which the application is defined as a user for authentication purposes.

- **Date Generated:** The date when the application record was created or regenerated in Order Administration, including when the record was received from IDCS or OCI IAM, or generated or during the creation of a new record through Xstore On Premises authentication. Display-only.

XOffice on premises and the parent ID: The page displays records only if they are not associated in IDCS or OCI IAM with a parent ID. If you use XOffice on premises, each store location record in IDCS or OCI IAM is associated with the XOffice on premises application as its parent ID. Because there can be many store locations associated with the parent application record, the **Manage External Application Access** page displays just the XOffice rather than the individual store locations.

For more information:

- *Manage External Application Access* for an overview of the **Manage External Application Access**page.
- *Manage External Application Access Options* for a description of the options available at the **Manage External Application Access** page.

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Enterprise Data Import History

Purpose: Use the Enterprise Data Import History page to review recent activity of the OCDSITM and OCDSFA periodic functions, which are part of the Enterprise order, merchandising, and foundation data integrations. These periodic functions use the Omnichannel Cloud Data Service (OCDS) to retrieve information originating in Oracle Retail Merchandising Foundation Cloud Service (RMFCS) and Oracle Retail Pricing Cloud Service (RPCS).

About the enterprise data and order integration: You can use the enterprise integration for:

- Importing information and creating and updating records, including merchandise hierarchy, items and SKU's, item warehouses and store locations, prices, and item images (OCDSITM periodic function).
- Using purchase order information originating in RMFCS to control when pre-orders should be fulfilled through submission to Order Orchestration (OCDSFA periodic function).

Where is the import history stored? The INT_OCDS_STATUS table tracks the activity of the OCDSITM and the OCDSFA periodic functions. These are the records displayed at the Enterprise Data Import History page.

When is enterprise data import history purged? When the OCDSITM periodic function runs, it purges enterprise data history records that are older than the `OCDS_JOB_HISTORY_RETENTION_DAYS` property, defined in Working with Admin Properties (CPRP) in Classic View. For example, if this property is set to 25 days, each time the OCDSITM function runs, it purges records older than 25 days.

For more information: For background on the enterprise order integration, see the following Classic View help topics:

- **Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS)**
- **Enterprise Order Integration (Future Receipts and Pre-Order Processing)**

How to display: Select Enterprise Data Import History from a menu:

> **Note:**
>
> ALLOW or DISPLAY authority to the EDIH menu option is required for access to this page.

For more information:

- *Enterprise Data Import History Options* for instructions on filtering the data displayed on the **Enterprise Data Import History** page.
- *Fields on Enterprise Data Import History* for a description of the fields on the **Enterprise Data Import History** page.

Enterprise Data Import History Options

Purpose: The filtering options at the **Enterprise Data Import History** page are described below.

For more information:

- *Enterprise Data Import History* for an overview of the **Enterprise Data Import History** page.
- *Fields on Enterprise Data Import History* for a description of the fields on the **Enterprise Data Import History** page.

Filtering displayed records: The *Enterprise Data Import History* page displays the first 50 records in reverse chronological order (newest to oldest).

The page provides an entry field at the top of the page. You can further refine the history records displayed by entering one or more search terms found in any of the fields displayed at the page.

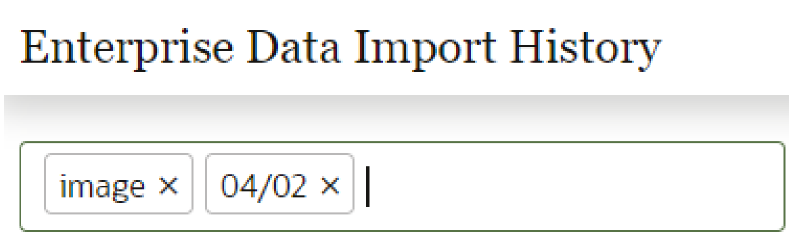
Example: Enter `ITEM`. The displayed results include history records related to item, such as ITEMLOCATION and ITEMIMAGE. Next, enter `02/06`. Displayed results are now further restricted to history records that include a Create Date that includes 02/06, provided the records also include the term “item.”

Filtering is across all results: The filtering is not restricted to the history records displayed on the first page of results. For example, if the only history record matching your entry is on the third page of results, this record is displayed.

Additional information on filtering:

- Filtering is not case-sensitive. For example, you can enter `image` or `IMAGE` to display matching records.
- To filter based on create date, include the date delimiters. For example, enter 8/27 rather than 827 to filter for a create date of August 27.
- You can filter based on numeric fields to display partial matches. For example, if the total row count total is 2008, you can enter 200 or 008 to include the record in the search results.

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.



For more information: See *Enterprise Data Import History* for background.

Fields on Enterprise Data Import History

Purpose: The following information is on the **Enterprise Data Import History** page. All fields are display-only.

- **Function Name:** The periodic function that generated the import history. Possible functions are:

OCDSFA: Imports future availability information about pre-order items through communication with Omnichannel Cloud Data Service (OCDS).

OCDSITM: Imports merchandise hierarchy and item-related information, as listed below. This periodic function also purges outdated history records based on the `OCDS_JOB_HISTORY_RETENTION_DAYS` property, defined in Working with Admin Properties (CPRP) in Classic View.

- **Import Type:** Import types and the updated data for each are:
  - **FUTUREAVAILABLE:** Future availability information in the item warehouse table (OCDSFA).
  - **ITEMIMAGE:** The image links for items.
  - **ITEMLOCATION:** The item and SKU tables in addition to the data updated through the ITEMSKU import type; including item status, unit of measure, and the **Restrict** flag.

Item price import types:

- **ITEMPRICEINI:** The initial item price.
- **ITEMPRICECLR:** The clearance price.
- **ITEMPRICEREG:** The regular item price.
- **ITEMSKU:** The item, SKU, item warehouse, and item location tables.
- **MERCHHIER:** The Long SKU Division, Long SKU Department, and Retail Class.

- **Import Summary:** Summarizes the activity tracked for the import. Typical import summaries include:
- **Import finished:** Summary for the FUTUREAVAILABLE import type.
- **Import finished with execution time of N seconds. Total rows count N. Updated rows count N. Inserted rows count N**, where N is the number of seconds or rows: Summary for import types other than the FUTUREAVAILABLE.
- **Starting Import for Type:** Indicates when the import started. The import type is indicated for import types other than the FUTUREAVAILABLE, for example, **Starting Import For Type:ITEMLOCATION**.
- **Create Date/Time:** The date and time when the history record was created.

For more information:

- *Enterprise Data Import History* for an overview of the **Enterprise Data Import History** page.
- *Enterprise Data Import History Options* for a description of the options available at the **Enterprise Data Import History** page.

Also, see **Importing Enterprise Foundation Data through Omnichannel Cloud Data Service (OCDS)** and **Enterprise Order Integration (Future Receipts and Pre-Order Processing)** in the Classic View online help for background.

71 Narvar Order Export Errors

Purpose: Use the Narvar Order Export Errors page to review Narvar order requests that have failed and, optionally, resend one or more requests.

These errors are stored in the INT_NARVAR_EXPORT_ERROR table.

About the Narvar integration: The Narvar integration enables you to use Narvar to generate shipment and delivery update emails.

For more information: For background on the Narvar integration, see the Narvar Integration help topic in Classic View.

How to display: Select Narvar Order Export Errors from a menu:

> **Note:**
>
> ALLOW or DISPLAY authority to the NOEE menu option is required for access to this page.

For more information:

- *Narvar Order Export Errors Options* for instructions on filtering the data displayed on the **Narvar Order Export Errors** page.
- *Fields on Narvar Order Export Errors* for a description of the fields on the **Narvar Order Export Errors** page.

Narvar Troubleshooting Information

Logging: Narvar log file: Based on the settings of the NARVAR_LOG_LEVEL property, activity related to the Narvar integration is written to this log file.

Narvar error summary:

Issue	Narvar.log Entry	Order Transaction History Message	Response Type	Error at Narvar Order Export Errors Page
Narvar Outbound Service URL (M58) is blank	`Shipment Tracking URL or credentials cannot be found`	Failure sending order to Narvar	0	oms.app.exception Application Failure

Issue	Narvar.log Entry	Order Transaction History Message	Response Type	Error at Narvar Order Export Errors Page
The order message is not generated because the **Narvar Non-Deliverable Email Address for Shipment Confirmations (M59)** is blank, and the order is not eligible to have the email actually sent to the customer (see that system control value for more information)	`Missing Narvar Non-Deliverable Email Address`	Failure sending order to Narvar	0	oms.app.exception Application Failure: Missing Narvar Non-Deliverable Email Address
The user ID and password specified for Narvar Service are not valid. See the Work with Outbound Web Service Authentication Screen in the Classic View online help for more information.	`Bad Credentials, Please provide valid acck and auth token.`	Failure sending order to Narvar	401	unauthorized.action Bad Credentials, Please provide valid acck and auth token.
The Narvar Outbound Service URL (M58) is invalid	`Shipment tracking order response code 405 and message {"status":"ERROR","messages":[{"level":"ERROR","code":"method.not_allowed","message":"Request method POST not supported"}]}`	Failure sending order to Narvar	405	method.not.allowed Request method POST not supported

Issue	Narvar.log Entry	Order Transaction History Message	Response Type	Error at Narvar Order Export Errors Page
The shipment date specified was not formatted correctly.	`message.invalid.order.shipments.date` `Invalid ship date. Please enter UTC format 'yyyy-MM-dd'T'HH:mm"SSS.zzz' for ship date`	Failure sending order to Narvar	422	message.invalid.order. shipments.date Invalid ship date. Please enter UTC format 'yyyy-MM-dd'T'HH:mm"SSS.zzz' for ship date

Narvar Order Export Errors Options

Purpose: The options at the **Narvar Order Export Errors** page are described below.

- *Filtering Order Export Errors*
- *Review the Order for a Narvar Error*
- *Refresh Displayed Errors*
- *Resend an Order Export*
- *Resend All Order Exports*

For more information:

- *Narvar Order Export Errors* for an overview of the **Narvar Order Export Errors** page.
- *Fields on Narvar Order Export Errors* for a description of the fields on the **Narvar Order Export Errors** page.

Filtering Order Export Errors

The *Narvar Order Export Errors* page displays the first 50 records in reverse chronological order (newest to oldest).

The page provides an entry field at the top of the page. You can further refine the error records displayed by entering one or more search terms found in any of the fields displayed at the page.

Example: Enter `VALID`. The displayed results include error records whose error messages are related to an invalid ship date or indicate that a valid acck and auth token are required. Next, enter `123`. Displayed results are now further restricted to error records whose order numbers include the numbers 123 in order.

Filtering is across all results: The filtering is not restricted to the error records displayed on the first page of results. For example, if the only error record matching your entry is on the third page of results, this record is displayed.

Additional information on filtering:

- Filtering is not case-sensitive. For example, you can enter `valid` or `VALID` to display matching records.

- Filtering based on date is not supported.
- Filtering based on ship-to number is not supported. You can search based on the order number only, without including the ship-to suffix (such as -002).

Removing a search term: Optionally, click the **X** next to a search term to remove it from the filter criteria.

For more information: See *Narvar Order Export Errors* for background.

Review the Order for a Narvar Error

Click the order number to open the *Order Summary* page, where you can review or work with the order.

Refresh Displayed Errors

Click **Refresh** in the upper right to refresh the displayed Narvar errors.

Resend an Order Export

Click **Resend** for an error to attempt to send the order request to Narvar.

The order request will be generated with the current information on the order, which might be different from the information from when the error originally occurred; for example, a shipment, return, or cancellation could have taken place.

Resend All Order Exports

Click **Resend All** in the upper right to attempt to resend all order requests to Narvar and generate shipment confirmations for all orders. For example, you might use this option if a system control value required for Narvar integration was set incorrectly, and you have now corrected it.

If the request fails again, a new error record is created with a new sent date.

Fields on Narvar Order Export Errors

Purpose: The following information is on the **Narvar Order Export Errors** page. All fields are display-only.

- *Order Number*: Click the link to open the *Order Summary* page, where you can review or work with the order
- **Sent Date:** The date and time when the order request was generated.
- **Response Type:** The Narvar response type. Possible response types include:
  - **0: Application Failure.** The order request could not be sent. This can occur if, for example:

        * The *Narvar Outbound Service URL (M58)* is blank. In this case, the Error message indicates only `Application Failure`.
        * The *Narvar Non-Deliverable Address for Shipment Confirmations (M59)* is blank. In this case, Error message indicates `Application Failure: Missing Narvar Non-Deliverable Email Address`.
    – **401: unauthorized.action. Bad Credentials, Please provide valid acck and auth token.** The message failed because the authentication credentials, set up through Work with Web Service Authentication (WWSA), were invalid.
    – **405: method.not.allowed. Request method POST not supported.** The message failed. Can occur if the *Narvar Outbound Service URL (M58)* is invalid.
    – **422: message.invalid.order. shipments.date. Invalid ship date. Please enter UTC format 'yyyy-MM-dd'T'HH:mm"SSS.zzz' for ship date.** The message failed because the ship date was invalid.
- **Error Message**: The message describing the error. See above for examples.

Configuration issues: Check your Narvar integration setup if you see the following error codes:

- 400: BAD REQUEST
- 403: FORBIDDEN
- 404: NOT FOUND

Other errors: Contact your Oracle representative or Narvar for information on the following error codes:

- 304: NOT MODIFIED
- 409: ITEM ALREADY EXISTS
- 500: INTERNAL SERVER ERROR
- 502: INTERNAL SERVER ERROR
- 503: SERVICE UNAVAILABLE or INTERNAL ERROR

For more information:

- *Narvar Order Export Errors* for an overview of the **Narvar Order Export Errors** page.
- *Narvar Order Export Errors Options* for a description of the options available at the **Narvar Order Export Errors** page.

Also, see **Narvar Integration** in the Classic View online help for background.

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Tax Files Upload

Overview: How the external tax interface is enabled and configured has changed. The *Use Generic XML Tax Interface (J10)* system control value now defines the tax interface to use and is no longer a Yes/No field. Possible settings are:

- AVATAX: Use the Avalara AvaTax interface.
- VERTEX: Use the Vertex interface. The version is also displayed depending on the TAX_INT IJCT setting.
- NONE: Do not use a tax interface. If NONE is selected, a warning message is displayed: Tax Interface is not enabled. Contact your System Administrator.

> **Note:**
>
> The *webservicemapping.properties* file that was previously used to define the tax integration is no longer used and has been removed.

A new **Tax Files Upload** screen suite in Modern View allows you to Review, Upload (new and modified), Download, and Delete Tax property configuration files. Files are no longer stored directly on the server however, the formats of the files have not changed. If updating from a version earlier than 23.2.401.0, files will not be automatically moved. They need to be manually loaded.

How to display: Select **Tax Files Upload** from the System Admin menu:

> **Note:**
>
> ALLOW authority to the TAXU menu option is required for access to this page.

Required properties: The following new properties are required to configure the Tax File Upload:

• *oms.cloud.file.transfer.url (CPRP)*: The full URL for file transfer service.

• *oms.cloud.file.transfer.bucket (CPRP):* The bucket for file transfers.

• *oms.cloud.file.transfer.version (CPRP):* The version of the file transfer service.

• *oms.cloud.file.transfer.timeout (CPRP):* The timeout for the file transfer service.

> **Note:**
>
> From version 23.2.401.0, File Transfer Service properties will be auto-populated with values.

The following new property is required when integrating to AvaTax:

oms.tax.avatax.environment (CPRP): Defines if calling a Sandbox or Production environment for AvaTax. Defaults to blank.

For more information:

- See *Avalara AvaTax Setup* in the Implementation guide for more information on AvaTax configuration files.
- See *Vertex Setup* in the Implementation guide for more information on Vertex configuration files.
- *Tax Files Upload Options* for step-by-step instructions on the actions you can perform on the **Tax Files Upload** page.
- *Tax Files Upload Fields* for a description of the fields on the **Tax Files Upload** page.

Tax Files Upload Options

Purpose: You can perform the following actions on the **Tax Files Upload** page.

- *Upload Tax File*
- *Download Tax File*
- *Delete Tax File*

For more information:

- *Tax Files Upload* for an overview of the **Tax Files Upload** page.
- *Tax Files Upload Fields* for a description of the fields on the **Tax Files Upload** page.

Upload Tax File

There are two processes depending on if the tax configuration files are for a new file upload or new tax setup, or for upgrading an existing file.

- **New File**

  Use this process when uploading a new tax configuration file:

  1. Select the **Tax Files Upload** task from the task panel in Modern View.
  2. The **Tax Files Upload** screen is opened in a new tab displaying the screen contents including delivered files for both Vertex and Avalara AvaTax. Only valid files that are modifiable by retailers are shown. If there are no records to return, a **No Data To Display** message is shown.

     Select **Download** from the actions menu (⋮) for one of the delivered files. The file is stored on the target/destination folder in the local machine.

     Make desired changes in the downloaded tax configuration file and select the **Upload** button.
  3. Select the **Upload Tax File** button in the screen.
  4. The **Upload Tax File** panel is displayed to choose a file to upload. Files are added by a slide in panel with a drag and drop field. Only tax files using the exact file name and format for the tax merchant can be uploaded.

5. Select the prepared file (for example, DefaultValues_NNN.xml) to upload from the local system/desktop and click **OK** in the **Upload Tax File** panel. Only one file at a time can be uploaded. Default files can be used as templates:
   a. Vertex: DefaultValues_049.xml, DefaultValues_051.xml, Warehouses_049.xml, Warehouses_051.xml
   b. AvaTax: AvaTaxValues_049.properties, AvaTaxValues_051.properties

   A processing window appears as the file is being uploaded. Remain on the screen until processing is complete.
6. In the back-end, the upload process flow takes over and the intended file is added as a new record in the new database table. The **Tax Files Upload** screen displays the newly uploaded file.
7. There is a standard snackbar message displayed on the **Tax Files Upload** screen indicating the file has been uploaded.

- **Existing File**

  Use this process to download, modify, and upload an existing tax configuration file:
  1. Select the **Tax Files Upload** task from the task panel in Modern View.
  2. The **Tax Files Upload** screen is opened in a new tab displaying the existing tax configuration files. Only valid files that are modifiable by retailers are shown. If there are no records to return, a **No Data To Display** message is shown.
  3. Select **Download** from the actions menu (⋮) for one of the files shown. The file is stored on the target/destination folder in the local machine.
  4. Make desired changes in the downloaded tax configuration file and save the modified file with the exact same filename to replace it.
  5. Select **Upload** to upload the modified file. The **Upload Tax File** panel is displayed to choose a file to upload. Files are added by a slide in panel with a drag and drop field. Only tax files using the exact file name and format for the tax merchant can be uploaded.
  6. Select the modified file to upload from the local system/desktop and click **OK** in the **Upload Tax File**. A processing window appears as the file is being uploaded. Remain on the screen until processing is complete.
  7. The existing file in the database is replaced with the new file and modified date/user fields are updated for the record.
  8. There is a standard snackbar message displayed on the **Tax Files Upload** screen indicating the file has been uploaded.
  9. If the Tax Merchant for the corresponding file that was uploaded is enabled, it will immediately start using the updated file contents.

> **Note:**
>
> Even if a retailer is supporting multiple versions of Vertex, at any single point of time, any one version will be used by the retailer. From a tax properties file perspective, when a newer version file is uploaded, it will just replace the older version file. The version would be determined by the TAX_INT IJCT process.

Download Tax File

1. Select the **Tax Files Upload** task from the task panel in Modern View.
2. The **Tax Files Upload** screen is opened in a new tab displaying the existing tax configuration files.
3. Select **Download** from the actions menu (⋮) for one of the delivered files. Only one file can be downloaded at a time.

Delete Tax File

Delete either single or multiple tax files can be deleted.

1. Select the **Tax Files Upload** task from the task panel in Modern View.
2. The Tax Files Upload screen is opened in a new tab displaying the existing tax configuration files.
3. Select **Delete** from the actions menu (⋮) for one of the delivered files.
4. A warning message displays the name of the file being deleted along with a standard message. Select **OK** to confirm the deletion. The file is removed permanently from the database table and is no longer displayed in the **Tax Files Upload** screen.
5. There is a standard snackbar message displayed on the **Tax Files Upload** screen indicating the file has been successfully deleted.

Tax Files Upload Fields

Purpose: The following information displays on the **Tax Files Upload** window.

For more information: For more information on Tax Files Upload, see:

- *Tax Files Upload* for an overview of the **Tax Files Upload** page.
- *Tax Files Upload Options* for step-by-step instructions on the actions you can perform on the **Tax Files Upload** page.

Tax Files Upload Window

The Tax Files Upload window displays information for the configuration files for the tax interfaces. Existing configurations can be retrieved, modified, and uploaded, or new configuration files uploaded.

The **Tax Files Upload** panel displays the following fields:

Upload Tax File: Used to upload a new or an existing file with a valid filename. Files are added by a slide in panel with a drag and drop field. Only one file at a time can be uploaded. Only tax files using the exact file name and format for the tax merchant can be uploaded.

Refresh: Select to update the data on the screen on-demand.

Enabled Tax Merchant: Read-only label indicating the currently enabled tax merchant for the company such as Avalara AvaTax or Vertex.

If *Use Generic XML Tax Interface (J10)* system control value is AVATAX, then “AvaTax interface is enabled" is displayed.

If *Use Generic XML Tax Interface (J10)* system control value is Vertex, the version is also displayed depending on the TAX_INT process.

- If the Inbound XML Msg/WSDL Doc Name in the TAX_INT IJCT process = CalculateTax90.wsdl , then "Vertex 9.0 interface is enabled" is displayed.
- If Inbound XML Msg/WSDL Doc Name in the TAX_INT IJCT process = CalculateTax70.wsdl, then "Vertex 7.0 interface is enabled" is displayed.

If *Use Generic XML Tax Interface (J10)* system control value is set to NONE, a warning message is displayed: Tax Interface is not enabled. Contact your System Administrator.

Filter results: Optionally, you can further filter the results by using the **Filter results** field above the list of files to enter one or more terms to search across any of the displayed information.

Sort the search results: You can sort on any column by clicking on the column name. An arrow pointing up displays next to the field when the values for the field display in ascending sequence; an arrow pointing down displays next to the field when the values for the field display in descending sequence.

File Name: Name of the file as it is from the Database. It is case-sensitive and must be stored and displayed as it is from the database.

Interface Type: Name of the tax merchant such as AvaTax or Vertex.

Created By: User id of the user who create/uploaded the file.

Created Date: Date the file was added into the database.

Modified By: User id of the user who edited/uploaded the file.

Modified Date: Date when an existing file was uploaded again.

Ellipsis: Actions available for each record. Options are Delete and Download. See *Delete Tax File* and *Download Tax File* for more information.

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Keyboard Shortcuts

Keyboard shortcuts available in Modern View to open windows or advance to pages are listed below.

Display a list of available shortcuts: Press CTRL + ALT + / to display the list of available keyboard shortcuts in the help panel to the right of the main window.

Hide help panel and shortcuts: If the help panel is open, press CTRL + ALT + / to close it.

> **Note:**
>
> Keyboard shortcuts are not available if a window requiring an action is open.

Close current active tab: Press CTRL + ALT + k to close the tab that is currently displayed.

For example, if the *Order Summary* and *Search for Orders or Customers* pages are open, and the Order Summary page is the current tab, pressing CTRL + ALT + k closes the Order Summary page and returns you to the **Search for Orders or Customers**. page.

You can't close the tab if you are working on an order that is currently locked. You need to unlock the order before you can close the tab.

Return to search:

- **New search:** Press CTRL _ ALT + o (letter o rather than zero) to return to the *Search for Orders or Customers* page, where you can perform a new search.
- **Edit search:** Press CTRL + ALT + 1 to return to the *Search for Orders or Customers* page, where your previous search criteria are retained, provided:
  - You searched using information about the customer, such as the customer last name, and the search results included multiple customers; or,
  - You searched using information about the order, such as an item on the order, and the search results included multiple orders.
  - Otherwise, if your search results included only a single customer or order, your search criteria are not retained, and you can perform a new search.

Unlock order: Press CTRL + ALT + u to unlock an order that is currently locked.

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Glossary

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

A

Account Number

Payment account number.

Alphanumeric, 20 positions.

Account Provider

The merchant account provider is the payment provider that has responsibility for directly maintaining the relationship with the merchant. Oracle Retail EFTConnect facilitates integration with these payment gateway providers. CyberSource and Adyen are base delivered providers and all other providers listed within *Payment Configurations* are custom Oracle Payment Interface (OPI) payment services.

Active Since

If the *ORCE Customer Integration (L37)* system control value is set to INTERACT, this is the date when the customer record was created in Customer Engagement. The date of the customer's first order, from the **Active since date** in the Customer Sold To Order History table.

Numeric, 8 positions (in user date format).

Activity

The type of activity performed against an order or order line for the customer.

See *Order Activity* for a description of the information displayed on the *Order Activity* page.

See *Order Line Activity* for the information that is displayed in the *Order Line Activity* window.

See *Recent Activity Description* for the information that is displayed under Recent Activity on the *Order Summary* page.

Activity Date

The date when an activity on an order or order line occurred.

Numeric, 8 positions (user-date format).

Activity Description

A description of the order activity. See *Order Activity* for a list of descriptions associated with different order-level activities, and see *Order Line Activity* for a list of descriptions associated with order line-level activities and for additional background.

Alphanumeric.

Activity Quantity

The quantity of the item affected by the order line activity. For example, `3-` indicates that three units of the item were canceled. Activities that do not affect the order quantity, such as changing the pricing of the order line, do not display a quantity. See the *Order Line Activity*, for more information on the quantities displayed for different types of order line activities.

Numeric, 5 positions.

Activity Reason

The reason for the order line activity.

Exchange Reason

Represents a reason for the customer to exchange one item for another.

Exchange reasons are defined in and validated against the Exchange Reasons table; you can create and work with exchange reason codes using the **Work with Exchange Reason Codes (WEXR)** menu option. See **Establishing Exchange Reason Codes (WEXR)** in the Classic View online help.

Code: Numeric, 3 positions.

Description: Alphanumeric, 30 positions.

Cancel Reason

The reason for canceling the units or reducing the quantity. A cancel reason code is not stored for soldout cancellations, whether you sell out the item by selecting Sold-out in order entry or order maintenance, or through **Processing Auto Soldout Cancellations (MASO)**; however, the *Auto Soldout Cancel Reason (C20)* is displayed here if a backordered line was canceled at billing because the **Automatically cancel backorders** flag for the order was selected.

The cancel reason description is not displayed if the cancel reason code's **Reduce demand** setting is selected.

Cancel reason codes are defined in and validated against the Cancel Reason table; you can create and work with cancel reason codes using the **Work with Cancel Reason Codes (WCNR)** menu option. See **Establishing Cancel Reason Codes (WCNR)** in the Classic View online help.

Code: Numeric, 2 positions.

Description: Alphanumeric, 30 positions.

Return Reason

Represents a reason for the customer to return an item.

The Return Reason table stores history on returns by offer, and the system writes transactions to the Order History table whenever you perform a return. The system also writes return reason history to the Refund table for customer credit.

Return reasons are defined in and validated against the Return Reason table; you can create and work with return reasons using the **Work with Return Reason Codes (WRTR)** menu option. See **Establishing Return Reason Codes (WRTR)** in the Classic View online help.

Code: Numeric, 3 positions.

Description: Alphanumeric, 30 positions.

Add Reason

Represents the reason for adding an item to the order. Examples of reasons for adding items to an order include:

- mis-shipments
- exchanges
- allowing the customer to select a different item or SKU for a backordered item
- the item is a warranty part

You might want to track this information to identify problem areas, and focus your training or quality control efforts.

The system requires an add reason code if:

- The *Require Reason for Lines Added in Order Maintenance (D75)* system control value is selected, or
- The **Required reason code** field for the item offer or SKU offer is selected.

You can review add reason codes assigned to new order lines with the **Order Addition Audit Report**.

Add reason codes are defined in and validated against the Add Reason table; you can create and work with add reasons using the **Work with Add Reason Codes (WADR)** menu option. See **Establishing Add Reason Codes (WADR)** in the Classic View online help.

Code: Alphanumeric, 5 positions.

Description: Alphanumeric, 30 positions.

Activity User

The user ID of the person who performed the order line activity.

ID: Alphanumeric, 10 positions.

Name: Alphanumeric, 30 positions.

Add Line Reason

A code that represents the reason for adding an item to an order.

Add reason codes allow you to track the reasons you add items to orders. Examples of reasons for adding items to an order include:

- Mis-shipments
- Exchanges
- Allowing the customer to select a different item or SKU for a backordered item
- The item is a warranty part

You might want to track this information to identify problem areas, and focus your training or quality control efforts. You can review add reason codes assigned to new order lines with the **Order Addition Audit Report**.

The system requires an add reason code when you add an item if:

- The *Require Reason for Lines Added in Order Maintenance (D75)* system control value is selected, or
- The **Required reason code** flag for the item offer or SKU offer is selected.

Add reason codes are defined in and validated against the Add Reason table; you can create and work with add reasons using the **Work with Add Reason Codes (WADR)** menu option. See **Establishing Add Reason Codes (WADR)** in the Classic View online help.

Code: Alphanumeric, 5 positions.

Description: Alphanumeric, 30 positions.

Additional Charge

The code and description for a type of charge or credit applied to an order.

Additional charge codes are defined in and validated against the Additional Charge table; you can create and work with additional charges using the **Work with Additional Charge Codes (WADC)** menu option. See **Establishing Additional Charge Codes (WADC)** in the Classic View online help.

For more information: See *Types of Additional Charges* for the types of additional charges you can apply to an order.

Code: Alphanumeric, 2 positions.

Description: Alphanumeric, 30 positions.

Additional Charge Amount

The dollar amount of the charge or credit.

Default Additional Charge Amount

If a default charge amount is defined for the additional charge code, the amount will default to the order.

Additional Charge Amount Authority

Authority to change the additional charge amount is based on your authority to the *Enter Amount for Order Additional Charge Code (A80)* secured feature.

Regardless of your authority to the *Enter Amount for Order Additional Charge Code (A80)* secured feature, you cannot change the additional charge amount if the *Restrict Additional Charge Amount if Default Charge (F43)* system control value is selected and there is a default charge specified for the additional charge code.

Numeric, 13 positions with a 2-place decimal.

Additional Charge Billed

Indicates whether the customer has been billed for the additional charge.

Valid values are:

- **Yes** =Customer has been billed for the additional charge.
- **No** =Customer has not been billed for the additional charge.

> **Note:**
>
> If the charge has been billed, you cannot change or delete the additional charge.

Alphanumeric.

Additional Charge Date

The date when the additional charge was added to the order or last updated on the order.

Date: Numeric, 8 positions (in user date format).

Additional Charge User

The user ID of the person that added the additional charge to the order or who last maintained the additional charge on the order.

`System Generated` indicates that the additional charge was added to the order by the system.

ID: Alphanumeric, 10 positions.

Name: Alphanumeric, 30 positions.

Additional Charges

The total extra charges added to the order, invoice, or payment.

This can be an additional service charge defined for the source code or offer used on the order, an additional shipping charge for an item on the order, a guaranteed service charge defined for the offer, or any type of miscellaneous charge or credit added to the order.

You can create and work with additional charges in the **Work with Additional Charge Codes (WADC)** menu option.

Additional charges may include:

- **Additional Source Code Charge**: An additional charge for services that apply to the source code or offer. These charges apply if you have set up a service charges table for the source code or offer. The system applies the additional charge to the order based on the total dollar value of the merchandise.
- **Additional Shipper/Item Charge**: An additional charge that applies to the item, depending on the shipper you select to deliver the item. Such charges may apply when the item exceeds established shipping rate charges. For example, delivery of an oversized item may incur an additional shipper/item charge. Additional shipper/item charges apply when defined for the shipper.
- **Ad Hoc Charge**: An additional charge, such as a charge for a gift box, that you assign at order entry. You initially define ad hoc charges in the Additional Charges table.
- **Dollar Discount**: An additional charge (credit) that is applied based on the total dollar value of the merchandise.

For more information: See:

- *Types of Additional Charges* for the types of additional charges you can apply to an order.
- **Establishing Additional Charge Codes (WADC)** in the Classic View online help for more information on creating and working with additional charge codes.

Numeric, 13 positions with a 2-place decimal.

Additional Shipping

The total dollar amount for shipping, or freight, charges exceeding the order's base freight charge. Additional freight reflects charges that are specific to the carrier, as defined for the shipper in the Ship Via table. You can create and work with additional shipping charges in the **Work with Ship Via Codes (WVIA)** menu option.

Example: Examples of additional shipping charges include charges for overnight shipping, or second day delivery.

Additional shipping charges may include the standard freight charges, depending on how you have set up the shipper.

For more information: See **Working with Ship Via Codes (WVIA)** in the Classic View online help for more information on creating additional shipping charges for a shipper.

Numeric, 13 positions with a 2-place decimal.

Address Book

The Address Book supports the ability to manage (get, add, edit and delete) multiple shipping names/addresses associated with an individual customer. The Address Book can be accessed from within Modern View Order Entry as well as from the Customer Order List screen.

During order entry, the Ship-To (shipping location) automatically defaults to display the customer's name and address. If the customer would like to ship the order somewhere other than their primary address, the Ship-To can be edited to create a One-Time Address or to assign a Customer Address Book entry.

Addresses are kept on file for the sold-to customer. The ship-to address is where the order is being shipped to. It may not be the customer’s home address. For example, the order could be shipped to the customer's work address. The system adds a separate record to the Customer Ship-to table for each shipping address under the customer number that is saved to the Customer Address Book. By saving an address book entry for the customer you can search for the address on file instead of re-entering the address each time. This is a useful feature for customers who repeatedly ship to an alternate address.

Likewise, the order may be shipped to a friend or family member. Again, these ship-to details such as name, address, postal code, phone number, can be added to the address book to save time re-entering the information each time an order is sent to a recipient.

A one-time ship-to address is not stored in the address book for the customer sold-to. However, after entry of the one-time customer details, an option allows the details to be saved in the address book rather than a one-time use.

Address Verification Response

The code and description of the address verification response for an authorization transaction.

If AVS is not used, or the transaction is not an authorization transaction, this field is blank.

The AVS response is from the **AVS response** field in the Authorization History table.

Address verification services help to reduce the fraudulent use of credit cards by verifying that the billing address on the credit card is legitimate.

If the credit card charge is approved (authorized) but the order fails the address verification check, the order may be placed on hold (based on the value in the Hold reason field in the Vendor Response table). If so, the system removes pick slip preparation from the order. You must contact the customer and obtain correct address information, then take the order off of hold through the Release Held Orders function.

Code: Alphanumeric, 10 positions.

Description: Alphanumeric, 40 positions.

Adjusted Amount

The adjusted deposit amount of a deposit on an invoice after performing *Credit Card Net Exchange Billing*.

Numeric, 20 positions with a 2-place decimal.

Affect Inventory

Indicates whether the quantity available to sell (on-hand quantity) of the item is reduced during order entry.

Valid values are:

- **Yes** (default for regular items) = Inventory levels are affected during order entry and when you ship the order. During order entry, reserved and open inventory increase and available inventory is decreased; when you ship the order, on-hand inventory, pickable inventory, open inventory, reserved inventory and total inventory across all warehouses decreases.
- **No** (default for a non-inventory item) = Inventory levels are not affected.

The system creates a pre-generated pick for the non-inventory item, even if all other items on the order are not eligible for pick slip preparation; however, the system will not create a pre-generated pick for a non-inventory item if all other items on the order are backordered; when one or more backordered items are available, the system creates a pre-generated pick for the non-inventory item as well as for the available item(s).

> **Note:**
>
> The **Affect Inventory** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Alphanumeric.

Alternate Order Number

The alternate order number assigned to the order. This is typically the order number used to identify the order in an external system. The alternate order number is the **Ecommerce Order Number** in the Order Header Extended table.

Order API

If the order was created through the generic order interface (order API), this is the number used to identify the order in an external system.

Orders Received from Order Orchestration (Delivery or Pickup)

In the case of an order received from Order Orchestration (delivery or pickup), this is the order number in the system originating the order. If the originating system is Order Administration, the system prefaces the originating order number with the text `ORIG#:`. For example: `ORIG#: 9999-001`, where `ORIG#:` indicates the order originated in Order Administration, `9999` is the original order number in Order Administration, and `001` is the ship to number.

Order Entry (Classic View or Modern View)

If the *Alternate Order Number Prefix for Order Creation (M76)* system control value specifies a prefix and the order was created in Classic View or Modern View order entry or through Generate Customer Membership Orders (EGMO), this is the specified prefix followed by the order number. The order number is zero-filled, for example, ABC00000123, where ABC is the prefix code and 123 is the order number.

Alphanumeric, 35 positions.

Amount Billed

The amount that has already been billed against this pay method.

For credit card payments, this is the total amount billed to the credit card. The system updates this amount as soon as the card is billed even before you process deposits. If you are using deferred or installment billing, the total amount to charge the card displays, even if the total amount has not yet been billed.

> **Note:**
>
> If this is a prepay amount, and part of the prepayment total was applied to a membership program, only the remaining amount appears as the amount to charge or amount billed. For example, if the customer sent a check for $100.00 and $80.00 was applied to the membership program, $20.00 appears here.

Numeric, 20 positions with a 2-place decimal.

Amount Credited

The amount from this payment type that the customer has received as credit or refund, represented by the creation of a refund in the Refund table. This information is updated when the refund is processed or the refund check is cut.

Numeric, 20 positions with a 2-place decimal.

Amount to Charge

The total dollar amount that applies as a charge to the payment method. An amount is not defined for the catch-all payment on an order.

When you view a payment method, `Balance` displays next to the catch-all payment method on the order, indicating the balance of the charge for the order applies to the payment method. The balance charge occurs after charges to all other pay types on the order have reached their defined limit.

When you view a payment method, `Deactivated` displays next to a credit card payment method that has been deactivated.

Numeric, 13 positions with a 2-place decimal.

Apartment/Suite

The apartment or suite number where the customer receives mail or shipments.

Alphanumeric, 10 positions.

Arrival Date

The date when the customer wants to receive an order or order line.

The arrival date controls:

- Inventory reservation.
- Pick slip preparation.

> **Note:**
>
> The **Arrival Date** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Order Entered Date

This is the **Arrival Date** in the Order Header table.

Order Line Entered Date

This is the **Arrival Date** in the Order Detail table.

Influence on Reservation

The arrival date on the order controls whether inventory is reserved for each order detail line. The system uses this calculation:

```
arrival date - reservation lead days (B27) = reservation date
```

The system will not reserve inventory if the system-calculated date is greater than today's date. This is considered a future order. The system identifies each item on the order as a future order and assigns a backorder status to each item.

You can run the Evaluate Future Orders periodic function each evening to evaluate each item marked as a “future order.” The system reruns the arrival date calculation. The system reserves the required inventory based on the order date if the system-calculated date is less than or equal to today's date.

Influence on Pre-Generated Picks

The arrival date on the order controls whether the system creates pre-generated picks for the order. The system uses this calculation:

```
Arrival Date from Order Line (or Order Ship To) - (Pick Processing
Days (B37) + Ship Via Lead Days in WSHV) < or = Today's Date
```

The system creates a pre-generated pick for the order line if this system-calculated date is less than or equal to today's date; otherwise, the system does not create a pre-generated pick for the order line until the date is within the allotted time frame.

Numeric, 8 positions (in user date format).

Attention

The name of the person who should receive the order at the shipping destination. Included only for a different shipping address than the customer sold-to name and address.

Alphanumeric, 30 positions; optional.

Authorization Amount

The total dollar value to charge to the payment method.

Numeric, 13 positions with a 2-place decimal.

Authorization Date

The date you manually authorize a payment method, or the date the payment method receives an authorization from the authorization service.

Numeric, 8 positions (in user date format).

Authorization Number

The authorization number assigned to the payment transaction.

Authorization Transaction

The authorization number from the manual authorization or the service bureau.

Authorization Reversal Transaction

The authorization code associated with the transaction that was reversed.

Deposit Transaction

The authorization code from the service bureau.

Alphanumeric, 16 positions.

Authorization Request ID

A request ID (transaction ID) that is assigned by the authorization service, such as CyberSource. Required to submit a manual authorization.

Alphanumeric, 40 positions.

Authorization Response

The response received from the service bureau for an authorization transaction. This is the message text from the **Pop Up Window Messages # 1 - # 4** fields for the vendor response you received from the service bureau. This message text should indicate whether the credit card has been approved or declined and any action that you should take to correct any problems and inform the customer.

Alphanumeric, four 40-position fields.

Authorization Service

A service bureau used to process transactions against a card payment, such as authorizations, settlements (deposits), and balance inquiries.

You can create and work with authorization services in the **Work with Authorization Services (WASV)** menu option.

For more information: See **Setting Up Authorization Services** in the Classic View online help for more information on defining the authorization services used by your company.

Code: Alphanumeric, 3 positions.

Description: Alphanumeric, 30 positions.

Award Applied

The amount of any loyalty award applied toward the order total if the loyalty integration with Customer Engagement is in place. The *Currency Code* is also indicated. This field is displayed only if the *Use ORCE Loyalty (M06)* system control value is selected. In this case, an award amount of 0.00 is displayed if no award was applied to the order.

For more information, see the *Customer Loyalty List* page and the *Customer Engagement Loyalty Integration* help topic in Classic View.

Numeric, 13 positions with a 2–place decimal.

B

Backorder Date

The next date when an order line is eligible to generate a backorder notice. The **Generate Backorder Notices (GBOC)** menu option allows you to generate notices (cards, emails, or the Outbound Email XML Message (CWEmailOut)) informing customers when backordered items are expected to ship. The function automatically generates an initial (first) backorder notice if you select the **Immediate B/O Notice** field for an order type (origin) in the **Work with Order Types (WOTY)** menu option.

If you have defined a number in the *Number of Days to Delay Initial Backorder Notice (D89)* system control value, the system does not generate a notice for a backordered item unless you do not expect to ship the item until after the defined delay period.

> **Note:**
>
> Once an expected delivery date for a backordered item is expired or changed, the system automatically generates a backorder notice, regardless of the value in the **Immediate B/O Notice** field.

Backorder Date and Order Orchestration

If an order line is assigned to the Order Orchestration for fulfillment, this option does not generate backorder notices for the order line while the Order Orchestration request is in process; however, if the Order Broker cannot fulfill the order, the order line returns to standard backorder processing and is eligible for backorder notice generation.

Generate Notice if Purchase Order Changes?

The *FTC - Suppress Backorder Notice for Due Date Changes (L65)* system control value controls whether to generate a backorder notice if you change the due date for the next expected purchase order to a later date, or cancel the purchase order.

Quotes?

The system does not generate backorder notification emails for quotes.

For more information: See **Generate Backorder Notices (GBOC)** in the Classic View online help for more information on generating notices (cards, emails, or the Outbound Email XML Message (CWEmailOut)) informing customers when backordered items are expected to ship.

Numeric, 8 positions; in user date format.

Backorder Priority

Used by the Evaluate Backorders program to match items to backorders. A value defaults to this field if a priority was entered in the **B/O priority** (Backorder priority) field for the source code; and the header-level value, in turn, defaults to the **Priority** field on the order detail line.

The *Auto Update Order Priority (G45)* system control value controls whether the system automatically updates the priority of the order to 9 (highest priority) when you enter an override to the default **Arrival date** in order entry or order maintenance. If this system control value is selected, the system automatically updates the priority to 9 when you enter an override to the **Arrival date** on the order header or order detail screen. If this system control value is unselected, the system does not update the priority of the order when you enter an override to the Arrival date.

Immediate Reservation

If you use Immediate Reservation, this value determines the sequence in which orders with backordered items receive inventory. The Evaluate Backorders program uses the priority to determine which backorders receive stock first.

> **Note:**
>
> The **Backorder Priority** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Numeric, 1 position.

Backorder Reason

The reason why this item was backordered, as determined by the system. The system assigns a backorder status to items that could not be fulfilled (no on-hand inventory available for the item).

Valid values are:

- 0 = `Not enough (inventory) available in warehouse`.

- B = `Reservation bypassed`; if the *Use OROB for Fulfillment Assignment (M31)* system control value is selected, the system uses this reason for each item sent to Order Administration for fulfillment assignment.
- D = `Drop Shipment`.
- F = `Future order`.
- I = `No Itm WH or No allocate`.
- L = `SKU Reserve limit exceeded`.
- N = `Non-allocate Warehouse`.
- R = `Item Whse Reserve Freeze`.
- S = `Not selected batch reserve`.
- U = `Interactive unreserve`.
- W = `No warehouse specified`.
- Z = `Zoned reservation`.

When the Item Cannot be Reserved

If no quantity is available of the item, the reserved quantity for the item detail line is zero. The available quantity is updated by the quantity ordered; this value appears as a negative number. The system backorders the requested order quantity and updates the detail line with a backorder reason of `No allocate` and updates the backorder warehouse on the order detail line.

When the Item is Partially Reserved

If the entire quantity ordered is not available for the item, the quantity available is reserved and the quantity unavailable is backordered. The system updates the detail line with a backorder reason of `Not enough avail in whse`.

Order Orchestration Backorder?

If the detail line has been assigned to the Order Broker for fulfillment, the detail line is flagged as backordered and has a **Printed quantity** that is equal to the ordered quantity. In this case, the order line is flagged as drop ship. The backorder reason remains on the order line even after the line is fulfilled through the Order Broker.

Alphanumeric, 25 positions.

Backorder Warehouse

The warehouse assigned to fulfill a backordered item.

> **Note:**
>
> The **Warehouse** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Code: Numeric, 3 positions.

Description: Alphanumeric, 30 positions.

Batch Job Type

A type of batch job available for review at the *Batch Job Statistics* page. Batch job types available for selection are:

- **Authorizations:** Credit Card Authorization records for the current company.
- **Billing Data Queue:** Billing Header Data Queue records across all companies.
- **Deposits:** Credit Card Deposit Transaction records for the current company.
- **Item Upload:** Retail Item Upload records for the current company.
- **Picks Generated:** Pick Control Header records, broken out by billing batch number, for the current company.

Batch Number

The system-assigned number for a group of orders. Orders you receive through the order API are assigned to the *Default Batch for E-Commerce Orders in Error (G41)* if they are in error; similarly, orders received from Order Orchestration (delivery or pickup) that are in error are assigned to the *Order Broker Error Batch Number (K90)*. The system removes the batch number when you accept the batch if the order is error-free.

Numeric, 5 positions.

Billing Batch Number

A system-assigned number to identify a batch of pick slips.

Numeric, 7 positions.

Broker Delivery Type

Indicates the type of order:

- **Brokered Backorder**: Order Administration automatically sends backordered lines to the Order Broker module in Order Orchestration, so the orders can be assigned to locations for fulfillment.
- **Delivery**: Order Administration receives the order from Order Orchestration and ships the merchandise to the customer’s ship to address. Delivery orders are identified with a **D** in the **OBR Delivery Type** field in the Order Ship To table.
- **Ship for Pickup**: Order Administration or an external store location ships orders to another external store location for customer pickup if the merchandise is not already available at that location.
  - **Ship for Pickup** orders are identified with an **S** in the **OBR Delivery Type** field in the Order Ship To table.
  - **Retail Pickup** orders are identified with an **R** in the **OBR Delivery Type** field in the Order Ship To table.
- **Store Pickup**: Order Administration notifies an external store location that has inventory available that a customer will pick up an order. Ship for Pickup orders are identified with a **P** in the **OBR Delivery Type** field in the Order Ship To table.

> **Note:**
>
> The **Broker Delivery Type** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

For more information: See the **Oracle Retail Order Orchestration Integration** in the Classic View online help for more information on the integration between Order Orchestration and Order Administration.

Alphanumeric.

Brokered

Brokered indicates that the order line has been assigned to the Order Broker for fulfillment (brokered backorder) or if the customer is picking up the order at a store location where the inventory is already available (store pickup). In this case, the order line is flagged as Backorder and it has a **Printed** quantity that is equal to the ordered quantity. Select the **Brokered** link to advance to the Display Order Broker Details window where you can review information about a brokered backorder line.

For more information: See the **Order Broker Integration** in the Classic View online help for more information on the integration with the Order Broker module in Oracle Retail Order Orchestration.

Alphanumeric.

Bypass Reservation

Indicates whether to reserve the item during order entry if inventory is available.

- If the *Use OROB for Fulfillment Assignment (M31)* system control value is selected, the system selects this flag for each order line sent to Order Orchestration for fulfillment assignment.
- If the *Use OROB for Fulfillment Assignment (M31)* system control value is unselected, items that bypass immediate reservation must be reserved using **Interactive Reservation (MIRV)**. You can define an item to bypass reservation in the Item table.

Valid values are:

- **Yes** (default) = Do not bypass reservation.
- **No** = Bypass reservation.

This setting may default from the Item table if the item is set up to bypass reservation, because it is available in a limited quantity or it is a limited edition.

For more information: See:

- **Order Broker Integration** in the Classic View online help for more information on fulfilling orders through Order Orchestration.
- **Working with Interactive Reservation (MIRV)** in the Classic View online help for more information on reserving stock for specific orders, customer classes, or items via an interactive entry program.

Alphanumeric.

C

Calculate Shipping (Freight)

Determines whether the system calculates and adds shipping (freight) charges and any service charges by ship via to the order.

- **Yes** = The system calculates freight based on the freight method defined for the source code. You can also define a freight override for the order ship to at the Work with Order Ship to Properties Screen.
- **No** = The system does not calculate freight.

> **Note:**
>
> The **Recalculate Shipping** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Alphanumeric.

Cancel Backorder

Indicates whether the system will cancel any backordered lines automatically after the first shipment on the order. Unshipped lines are canceled during Confirmation.

Valid values are:

- **Yes** = Items cannot be backordered.
- **No** = Items can be backordered.

If this field is selected, any open line on an order will be canceled during billing using the *Auto Soldout Cancel Reason (C20)*, provided this system control value specifies a valid cancel reason code.

> **Note:**
>
> The **Cancel Backorder** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Alphanumeric.

Cancel Date

The last date on which the customer will accept receipt of the order or order line. This field is blank if there is no “deadline” for delivery.

The system uses this calculation:

```
Cancel date

-Lead days (System Control table)

- Transfer days (Warehouse/Drop Point table)
```

```
- Lead days (SCF/Ship Via table) _

Date to stop reserving stock
```

Any items that have not shipped before the cancellation date are printed on the Order Cancellation List along with the customer's name and phone number.

Customer Service uses this list to contact each customer to see if the deadline can be extended. If not, Customer Service must cancel the order or order line.

Influence on Pre-Generated Picks

The cancel date on the order controls whether the system creates pre-generated picks for the order. The system uses this calculation:

```
Cancel Date > Today’s Date + Pick Processing Days (B37) + Ship Via
Lead Days in WSHV
```

The system creates a pre-generated pick for the order line if the cancel date is greater than this system-calculated date; otherwise, the system does not create a pre-generated pick for the order line.

> **Note:**
>
> The **Cancel Date** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Numeric, 8 positions (in user date format).

Cancel Reason

The reason for canceling an order line or ship-to order. This reason also applies when you cancel a partial quantity of the order line by lowering the order line quantity.

When you cancel a ship-to order and enter a cancel reason code, the system assigns the reason code to each open (unshipped) item on the order.

The Cancel Reason table stores history on cancellations by offer, and the system writes transactions to the Order History table whenever you perform a cancellation.

The system also writes cancel reason information to the Refund table for prepaid orders. Prepaid orders include orders paid by check or cash.

Prevent Refund?

You might designate whether to generate refunds for a cancel reason code, such as when you cancel fraudulent orders. When you use a cancel reason code flagged to prevent a refund, the refund record is still generated, but in a Cancel Pending status. The next time you use the **Process Refunds (MREF)** menu option, the refund is canceled.

Reduce Demand?

If the cancel reason code is not flagged to reduce demand, and you cancel all items on the order, the order status is set to Canceled; otherwise, if the cancel reason code is flagged to reduce demand, or any items have shipped, the order status is set to Closed.

Cancel reason codes are defined in and validated against the Cancel Reason table; you can create and work with cancel reasons using the **Work with Cancel Reason Codes (WCNR)** menu option. See **Establishing Cancel Reason Codes (WCNR)** in the Classic View online help.

Code: Numeric, 2 positions.

Description: Alphanumeric, 30 positions.

Canceled Quantity

The total number of units of the order line canceled.

Numeric, 5 positions.

Cancelled (Merchandise Value)

The merchandise amount total of canceled items for the current date. This total updates when you cancel an entire order or one or more lines on an order.

This is the **Orders canceled dollars** in the Order Control Summary table.

Numeric, 20 positions with a 2-place decimal.

Cancelled (Order Count)

The number of orders canceled (orders in **Canceled** status; all order lines have been canceled) for the current date.

This is the **Orders canceled number** in the Order Control Summary table.

Numeric, 9 positions.

Cancelled (Unit Count)

The total number of units canceled for the current date. This total updates when you cancel an entire order, or one or more lines on an order.

This is the **Quantity canceled** in the Order Control Summary table.

Numeric, 9 positions.

Card Balance

The remaining balance on a gift card.

For more information: See *Check Gift Card Balance* for more information on inquiring on the amount remaining on a gift card.

Numeric, 13 positions with a 2-place decimal.

Card ID Number

The ID number for the gift card payment. Define an ID number only if your gift card processor supports it. The system stores the ID number in the **OPM SVC ID Storage** field in the Order Payment Method table and includes it in the authorization request and deposit request sent for the gift card payment.

Numeric, 9 positions.

Card Number

The number of a credit card or gift card.

Alphanumeric, 20 positions.

Carrier Number

The customer's carrier account number that will be billed when the order ships by the carrier. The customer will not receive a bill directly for the order shipping charges; the carrier delivery service will be billed for the shipment (and, in turn, bill your account).

Alphanumeric, 10 positions.

Catch-All

A catch-all payment method is required if an order includes one or more credit card pay types. The system uses this card to charge the total balance remaining on the order after any other payment method has been charged.

Check Number

Payment check number.

Numeric, 6 positions.

City

The city in which the customer receives mail or shipments.

Alphanumeric, 25 positions.

Classic View

Classic View of Order Administration enables you to set up data, run reports, and perform many other functions that are not available in Modern View. You advance automatically to Classic View when you log in if the **Modern at Initial Login** setting for your user ID is not selected in Classic View.

Client ID

Uniquely identifies a client application in *IDCS or OCI IAM*:

- If the application is XOffice OnPrem, the client ID is RGBU_XTROFFOP_<ENV>_XOFFICE_APPID, where <ENV> is the environment, such as PROD for production. The XTROFFOP portion of the ID indicates that this is XOffice OnPrem. See *Manage External Application Access* for a discussion.
- If the application record was created through Order Administration or another Omnichannel Application, the client ID is formatted as RGBU_OMCS_<RANDOM>_APPID, where OMCS identifies the application, such as Order Administration, and <RANDOM> is a series of 8 random characters.
- Otherwise, if the application record was created in IDCS or OCI IAM, the client ID is a series of random characters.

This is the **Name** in IDCS or OCI IAM. Note that the **Display Name** in IDCS or OCI IAM is the **Client ID** without the _APPID suffix.

Alphanumeric, 255 positions.

Client Secret

A secure code that IDCS or OCI IAM creates for a client application, and that the client application passes to IDCS or OCI IAM for authentication. The client secret should be known only to the requesting application and to IDCS. You can request a client secret from IDCS or OCI IAM through the *Manage External Application Access* page.

Company Code

A code representing a company in Modern View.

Company codes are defined in and validated against the Company table; you can create and work with companies in the **Work with Companies (WCMP)** menu option. See **Setting Up Companies (WCMP)** in the Classic View online help.

For more information: See *Select Company* for more information on selecting a company in Modern View.

Numeric, 3 positions.

Company Description

The name of a company in Modern View.

Alphanumeric, 30 positions.

Company Name

The name of the company.

- Sold To: This is the name of the company that placed the order.
- Ship To: This is the name of the company receiving the order.
- Bill To: This is the name of the company charged for the order.

Alphanumeric, 30 positions.

Confirmed Quantity

The quantity of an item on an order line confirmed for shipment.

Numeric, 5 positions.

Contact Center

Contact Center is the component of *Modern View* that allows a customer service representative to perform order inquiry and order maintenance functions, such as:

- Reviewing customer and order information.
- Updating customer information, such as the customer’s name and address, and marketing preferences.
- Updating order information, such as the items on the order, pricing, and payment methods.

Coordinate Group

A code that you can enter on several order detail lines to ensure that they ship together. The system will not create a pre-generated pick for items with the same coordinate group number unless inventory is available for all of the items. Some items will be coordinate grouped automatically by the system, by virtue of the way the items were set up. You must use the same ship via for all items assigned to the same coordinate group.

> **Note:**
>
> The **Coordinate Group** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Numeric, 3 positions.

For all items on the order to be ship complete, see *Ship Complete*.

Count

The number of records in the same status displayed at the *Batch Job Statistics* page. Depending on the type of batch job statistics selected for review, counts may also be further restricted by company, authorization service, or billing batch number.

Country

The code for the country in which the customer receives mail or shipments.

Country codes are defined in and validated against the Country table. You can create and work with countries in the **Work with Countries (WCTY)** menu option.

You can also create information related to a country, such as:

- Any duty rates that apply to shipments to the country.
- The telephone number formats for each country.
- Valid states for each country, and whether they are subject to VAT.
- Whether a state or a postal code is required for a customer address.
- Whether a valid SCF/ship via is required for the ship via and shipping address on an order.
- A default VAT or tax rate for the country.

See **Setting Up the Country Table (WCTY)** in the Classic View online help.

Code: Alphanumeric, 3 positions.

Description: Alphanumeric, 30 positions.

Coupons

The integration with Oracle Retail Promotion Engine (ORPE) supports two options for coupon promotions, (Serialized and Non-Serialized).

- A Serialized Coupon allows the retailer to generate coupons, each with a unique serial number, generally for a one-time use. Depending on user authority, a contact center agent may have the ability to allow a previously redeemed serialized coupon to be submitted to ORPE. In this situation, ORPE will apply the coupon discount as long as the cart meets the coupon requirements.
  - If the Contact Center user has authority to the *Allow Redeemed ORCE Serialized Coupon to be Overridden* secured feature, they can submit a previously redeemed serialized coupon to ORPE by clicking a new **Attempt Reuse** link. For example: If the coupon represented a 10% discount on handbags, it would be automatically applied as long as the cart included a handbag.

- A Non-Serialized Coupon allows a retailer to define a coupon code for the promotion which can be used multiple times. For example, the coupon code ‘SHOE20’ may represent a coupon code that a customer can use multiple times to receive a 20% discount on a shoe purchase.

Coupon Number

The code that identifies the coupon applied to an order or order detail line.

For more information: See **Working with Coupon Promotions (WCPR)** in the Classic View online help for more information on using coupon promotions to offer percentage or dollar discounts on merchandise to customers.

Alphanumeric, 6 positions.

Credit Card Net Exchange Billing

Credit card net exchange billing allows the system to hold the credit invoice for a return to net it against the debit invoice for the associated exchange in order to reduce the number of transactions that occur for an exchange. The system uses the system-delivered **EXC** Net Billing for Exchanges deferred payment option to determine how long to delay billing the customer’s credit card, based on the invoice date and the **# of Days for Deferral** defined for the **EXC** payment option.

An order is eligible for net exchange billing if:

- The *Use CC Net Exchange Billing (M23)* system control value is selected, and
- The order contains a credit card pay type, and
- A deferred or installment pay plan has not already been assigned to the credit card pay type on the order.

> **Note:**
>
> If you use net exchange billing, you should not process returns in Contact Center, and should use Classic View instead.

Examples of Net Exchange Billing

The remaining amount after the system performs credit card netting determines whether the system charges or credits the customer’s credit card.

Even Exchange:

- Credit invoice for returned item = $50.00
- Debit invoice for exchange item = $50.00
- During deposits, the system nets the credit invoice containing the returned item against the debit invoice containing the exchange item to determine the remaining amount to deposit:

  ```
  50.00 debit - 50.00 credit = 0.00 balance
  ```

  The system does not charge or credit the customer’s credit card.

Uneven Exchange for Less Expensive Item:

- Credit invoice for returned item = $100.00

- Debit invoice for exchange item = $60.00

  During deposits, the system nets the credit invoice containing the returned item against the debit invoice containing the exchange item to determine the remaining amount to deposit:

  ```
  100.00 credit - 60.00 debit = 40.00 credit
  ```

  The system credits the customer’s credit card $40.00.

Uneven Exchange for More Expensive Item

- Credit invoice for returned item = $100.00
- Debit invoice for exchange item = $140.00

  During deposits, the system nets the credit invoice containing the returned item against the debit invoice containing the exchange item to determine the remaining amount to deposit:

  ```
  140.00 debit - 100.00 credit = 40.00 debit
  ```

  The system charges the customer’s credit card $40.00.

For more information: See **Credit Card Net Exchange Billing** in the Classic View online help for an overview on credit card net exchange billing.

Alphanumeric.

Credited

The quantity of the item credited on an invoice that the customer has returned.

Numeric, 5 positions.

Credited Date

The date you issued a credit for the returned merchandise on a return or exchange transaction.

Numeric, 8 positions (in user date format).

Credited Quantity

The total quantity of the returned items on a return or exchange transaction for which you have issued credit.

Numeric, 5 positions.

Currency Code

The code identifying the currency applying to an amount on the order, such as the invoice total. Currency codes are defined through the **Work with Currency (WCUR)** menu option in Classic View.

Alphanumeric, 3 positions.

Current Shipping Amount

The remaining unrefunded shipping charges on the order. Displayed when you are returning an order line or ship-to, and only if you select *Refund Shipping* and a freight override was applied to the order. For example, you can apply a freight override at the Work with Order

Ship To Properties screen in the Classic View of Order Administration. You cannot refund more than this amount for shipping.

Numeric, 13 positions with a 2-place decimal.

Customer Address

The mailing address for the customer.

The customer address consists of:

- *Street Address*
- *Apartment/Suite*
- *City*
- *State/Province*
- *Postal Code*
- *Country*

Customer Charged

Indicates whether the customer will be charged for the item.

Valid values:

- **No Charge** = The customer is not charged for the item. In this case, a *Price Override Reason* is also specified.
- **Priced** = The customer is charged for the item.

Alphanumeric.

Customer Class

The customer class assigned to the sold-to customer, used to categorize customers at a high level.

Customer class codes are defined in and validated against the Customer Class table. You can create and work with customer classes using the **Work with Customer Class Table (WCCL)** menu option. See **Setting Up the Customer Class Table (WCCL)** in the Classic View online help.

> **Note:**
>
> The **Customer Class** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Code: Alphanumeric, 2 positions.

Description: Alphanumeric, 30 positions.

Customer Membership Status

The current status of the customer membership.

Valid values are:

- **Active** = The customer membership is active; the system creates new membership orders and/or applies any discount if the Discount end date has not been reached.

> **Note:**
>
> Customer memberships associated with a quote display in an active status; however, the system does not generate a membership order until the quote is converted to an order; see Entering Customer Memberships in Quote Entry and Converting Quotes to Orders.

- **Inactive** = The customer membership is associated with a quote that has not been converted to an order or the customer membership has been deactivated; however, you can reactivate it via Work with Customer Memberships (WWCM). The system does not generate membership orders for an inactive membership, and any discount does not apply.
- **In process** = The membership order generation process is currently processing and this customer membership is eligible for order generation, or the membership order is currently in a suspended order batch. You need to correct the errors or delete the order and then accept the order batch to change the status of the customer membership. See Working with an Order Batch for more information on batch order entry.
- **Canceled** = The customer membership has been canceled before it was completed. You can only cancel a customer membership by selecting **Cancel** in Work with Customer Memberships (WWCM). You can also cancel a standard or discount-only membership by canceling the originating membership item or order in order maintenance; see Canceling a Membership Item for more information.

> **Note:**
>
> Canceling the items for a customer membership changes the status to Complete, not Canceled.

- **Complete** = The number of specified rotations for the customer membership has been reached, or all items on the customer membership have been canceled. If you do not specify the number of times to include for each item on the customer membership, the system does not consider the membership complete.
- **Error** = There is an error with the generation of a membership order.

Customer Name

The name of the customer on the order, typically formatted as LAST NAME, FIRST NAME.

The following customer types exist in Contact Center: sold-to, bill-to, and ship-to.

Sold-To Customer

A sold-to customer is a person who places an order. Name, address, and mailing information for sold-to customers is in the Customer Sold-to table only.

An order can contain only one sold-to customer.

If an order contains only a sold-to customer, this is the customer who places, receives, and pays for the order.

Ship-To Customer

A ship-to customer is a person who receives an order.

An order can contain one or more ship-to customers; during order entry, you indicate which items will ship to each ship-to customer. If an order contains both a sold-to customer and one or more ship-to customers, the sold-to customer places and pays for the order, and each ship-to customer receives the assigned items on the order.

- Permanent ship-to customers are customers who request a ship-to address different from their sold-to address. You can create permanent ship-to customers when you enter an order or using the **Work with Customers (WCST)** menu option. A single sold-to customer can be assigned to one or more permanent ship-to customer records. The Customer Ship-to table stores permanent ship-to customer information.
- Temporary ship-to customers are customers who receive the shipped order but do not place the order or pay for the order (for example, gift recipients). The Order Ship-to Address table stores temporary ship-to customer information.

Bill-To Customer

A bill-to customer is a person who pays for an order. A bill-to customer record is required when the person who pays for the order is different than the sold-to customer.

- If an order contains both a sold-to customer and bill-to customer, the sold-to customer places and receives the order, and the bill-to customer pays for the order.
- If an order contains a sold-to customer, bill-to customer, and one or more ship-to customers, the sold-to customer places the order, the bill-to customer pays for the order, and each ship-to customer receives the specified items on the order.

The system generates bill-to records for business-to-business customers. Business-to-business customers are customers who ship to a consistent address, have a permanent account, and are commercial in nature.

You can define a business-to-business customer by selecting the **Commercial** flag for a customer. Once you have established a bill-to customer account, the account remains permanently in the Bill-to customer table.

Customer Last Name: Alphanumeric, 25 positions.

Customer First Name: Alphanumeric, 15 positions.

Company Name: Alphanumeric, 30 positions.

Customer Number

A unique number that identifies a customer.

Customer sold to numbers are validated against the Customer Sold To table. You can create and work with customers using the **Work with Customers (WCST)** menu option.

For more information: See **Creating and Updating Customers** in the Classic View online help for more information on creating and working with customers.

Search based on Customer Engagement customer ID? If the *ORCE Customer Integration (L37)* system control value is set to INTERACT and the *Use Oracle Retail Customer Engagement Customer Number in Search* flag is selected in Work with

Contact Center (WWCC), then when you search based on customer number at the Search for Orders or Customers page, the system submits your entry to Customer Engagement as the Customer Engagement ID rather than the Order Administration customer number.

Customer Engagement ID displayed? When the *ORCE Customer Integration (L37)* system control value is set to INTERACT and the *Use Oracle Retail Customer Engagement Customer Number* in Search flag is:

- selected, the customer number displayed in Modern View is the Customer Engagement customer ID.
- unselected, the customer number displayed in Modern View is the Order Administration customer number.

Things to note:

- The *Use Oracle Retail Customer Engagement Customer Number in Search* flag setting does not affect how to update customers in Order Administration based on the information received from Customer Engagement. If Customer Engagement returns information on the customer, the customer record is still created or updated regardless of whether the flag is selected
- When the *Use Oracle Retail Customer Engagement Customer Number in Search* flag is not selected but the *ORCE Customer Integration (L37)* system control value is set to INTERACT, Customer Engagement returns any customer found that is assigned the entered customer number as an Order Administration alternate key, even if that customer did not previously exist in your Order Administration company. In this case, the customer record is created in Order Administration; or if a customer record already existed in your company with that customer number, the customer's name and address are updated with the information from Customer Engagement.

Numeric, 9 positions.

Customer Since

The date when the customer record was created. When the *ORCE Customer Integration (L37)* system control value is set to INTERACT, this is the signup date from Oracle Retail Customer Engagement; otherwise, it is the date when the customer record was created in Order Administration. Note that this date might be later than the earliest orders for the customer if you enabled the integration with Customer Engagement after you began creating orders and customers in Order Administration.

CVV/CID/CVC

The credit card's security value.

Authorization services use card security identification to help reduce fraud by verifying that the credit card is present at the point of sale and to ensure that the credit card data from the transaction matches the data stored by the authorization service for that card.

- **American Express**: The card security value, or CID (card identification number), is a 4-digit number imprinted, not embossed, on an American Express credit card. The card security value is above and to the right of the imprinted credit card number on the front of the card.
- **Discover**: The card security value, or CID (card identification number), is a 3-digit number in reverse indent printing located on the signature panel on the reverse side of the credit card following the account number.

- **VISA**: The card security value, or CVV2 (card verification value), is a 3-digit number in reverse indent printing located on the signature panel on the reverse side of the credit card following the account number.
- **MasterCard**: The card security value, or CVC2 (card validation code), is a 3-digit number in reverse indent printing located on the signature panel on the reverse side of the credit card following the account number.

Numeric, 4 positions.

D

Default Price

The price defined for the item in the *Current Offer Number (A33)* system control value. If the Tax Included in Price (E70) system control value is selected and the customer's address is subject to VAT, then this is the tax-inclusive price.

Numeric, 13 positions with a 2-place decimal.

Delayed Arrival

The date when the customer wants to receive an order or order line, if later than the current date.

The arrival date controls:

- Inventory reservation.
- Pick slip preparation.

> **Note:**
>
> The *Delayed Arrival* date field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Delivery Address Type

Identifies a business (commercial) or residential address. This field is used to calculate shipping charges for shippers that use rate tables (such as U.P.S.).

- **Business** = The ship to address is a business address.
- **Residential** = The ship to address is a residential address.
- **No distinction** = The ship to address has not been identified as business or residential.

Alphanumeric.

Delivery Type

Used at the *Sales Summary* page to indicate how the merchandise is delivered to the customer if the *Use Merchandise Locator (I38)* system control value is selected.

- **Direct Delivery:**
  - Order Administration fulfills the order from the warehouse, or

- Order Administration automatically sends backordered lines to the Order Broker module in Order Orchestration, so the orders can be assigned to locations for fulfillment (sometimes referred to as Brokered Backorder).

- **Delivery (D)**: Order Administration receives the order from Order Orchestration and ships the merchandise to the customer's ship to address. Delivery orders are identified with a **D** in the **OBR Delivery Type** field in the Order Ship To table.
- **Retail Pickup (R):** Order Administration receives the order from Order Orchestration and ships the order to the originating store location, where the customer picks it up. Retail pickup orders are identified with an **R** in the **OBR Delivery Type** field in the Order Ship To table.
- **Ship for Pickup (S)**: Order Administration receives the order, which has an external store specified as the pickup location, and ships the order to the specified store so the customer can pick it up. Identified with an **S** in the **OBR Delivery Type** field in the Order Ship To table.
- **Store Pickup (P)**: Order Administration creates the order and notifies an external store location that has inventory available that a customer will pick it up. Pickup orders are identified with a **P** in the **OBR Delivery Type** field in the Order Ship To table.

Not included at the Sales Summary page: The *Sales Summary* page totals do not include a fulfillment order for the original order when *Use OROB for Fulfillment Assignment (M31)* is selected. In this scenario:

- An order originates in Order Administration.
- Order Administration submits to Order Orchestration for fulfillment.
- Order Orchestration assigns the order back to Order Administration.
- Order Administration creates an additional order to fulfill the original order.

For more information: See the **Oracle Retail Order Orchestration Integration** in the Classic View online help for more information on the integration between Order Orchestration and Order Administration.

Alphanumeric.

Deposit Created Date

The date the deposit was created.

Numeric, 8 positions (in user date format).

Deposit Release Date

The date when the payment is eligible for deposit.

This date indicates when the invoice is eligible for deposit. If this date is equal to or prior to the current date, the invoice payment is eligible for deposit.

The system updates this field when a deposit is confirmed with the next deposit release date if there is a remaining amount to deposit. Typically, the deposit release date is the same as the invoice date.

Deferred or installment pay plans typically have a deposit release date (or dates) later than the invoice date:

- If the installment plan uses an interval, the deposit release date is calculated by adding the interval number of days to the current date.

- If the installment plan uses a fixed billing date, the deposit release date is changed to the next occurrence of the billing date.

Regular (non-pay plan) invoices have a deposit release date that is the same as the invoice date.

For a credit invoice payment method, the deposit release date associated with the original invoice is used as long as that date is on or after the current date. If the deposit release date of the original invoice is earlier than the current date, the deposit release date of the credit invoice is updated with the current date. This ensures that the customer is not credited until he has been billed; but if the customer has been billed, the credit is released immediately.

Numeric, 8 positions (in user date format).

Deposit Remaining

The total amount remaining to deposit for the pay method.

The system uses the following calculation to determine the deposit remaining amount:

```
deposit amount - amount deposited to date - prepaid amount -
adjustment amount = deposit remaining amount
```

Numeric, 13 positions with a 2-place decimal.

Deposit to Date

The total amount deposited for the pay method, including merchandise, freight, additional freight, additional charges, handling and tax.

Numeric, 13 positions with a 2-place decimal.

Discount% Off Price

The discount percentage applied to an order line using the *Discount Order Line* window when the *Price Discount Method* is **Discount% Off Price**. The percent discount is taken from the dollar amount in the *Unit Price* field.

Numeric, 5 positions with a 2-place decimal.

Discount Amount

The difference between the actual price charged for items and the offer prices. Comparing this amount to the original offer price gives you an indication of the amount that the order varied from the original offer price.

A negative amount indicates a charge greater than the original offer price.

Price overrides: When you override the price of an item, the system uses the following rules in determining what portion of the selling price constitutes a discount:

- If the price override reason code's **Override item offer price** field is selected, the discount amount equals the difference between the override price entered and the final selling price; in other words, it equals any additional discounts applied after the price override.

  Example: The price override amount entered was $10.00 and an additional discount coupon of $1.00 was applied; the discount amount is $1.00.

- If the price override reason code's **Override item offer price** field is unselected and an item/SKU offer price exists, the discount amount equals the difference between the offer price and the selling price.

  Example: The item offer price is $15.00, the price override amount entered was $10.00, and an additional coupon discount of $1.00 was applied; the discount amount is $6.00.
- If the price override reason code's **Override item offer price** field is unselected and an item/SKU offer price does not exist, the discount amount equals the selling price of the item, presented as a negative number.

  Example: The price override amount entered was $10.00 and an additional coupon discount of $1.00 was applied; the discount amount is -$9.00.

Numeric, 20 positions with a 2-place decimal.

Discount Percent

A flat discount percentage applied to discountable merchandise only (the **Discountable** field for the item is selected).

The discount applies only to new items added to the specified ship-to order. You must reenter the discount for each recipient on the order. The discount is not applied to existing items.

Numeric, 5 positions with a 2-place decimal.

Discount Price

The discount price applied to an order line using the *Discount Order Line* window when the *Price Discount Method* is **Discount Price**.

Numeric, 13 positions with a 2-place decimal.

Display

The overall size (generally height) of the text that displays on a screen in the application, where 100% is the standard font size. Any percentage lower than 100% displays a smaller text size and any percentage greater than 100% displays a larger text size.

For more information: See *Preferences*.

Numeric.

Distance

The number of miles or kilometers, based on the *Merchandise Locator Distance Measurement (I39)*, from the merchandise locator search location.

This distance might be approximate, depending on the actual criteria used to search (for example, postal code or city), and does not represent an actual driving distance.

No distance is displayed if the location is not set up in Order Orchestration to use proximity rules. In this situation, the location is always considered to be within the specified search radius.

The distance is rounded down when determining whether to include the location in the search results. For example, if the *Search Radius* is 10 miles, and the location is 10.84 miles away, the location is included in the results.

For more information: See *Item Availability (Merchandise Locator)*.

Numeric, 7 positions with a 2-place decimal.

Domain Description

A short description to identify a domain. Alphabetical characters in your entry are converted to upper case.

Drawer

A type of window that opens from the right of the page and partially covers the current page. A drawer may contain additional windows.

The online help drawer is not accessible when a drawer is open.

Drop Ship

Drop Ship indicates that the item is one that you do not typically stock in inventory, and which you must order from your vendor, who then ships the item directly to the customer.

An item is defined as a drop ship item in the Item table, or can be identified as a drop ship item in order entry or maintenance.

Order Orchestration Drop Ship?

If an order line has been assigned to the Order Broker for fulfillment (brokered backorder) or if the customer is picking up the order at a store location where the inventory is already available (store pickup), the order line is flagged as a drop ship item. In this case, the order line is flagged as **B/O** and it has a **Printed quantity** that is equal to the ordered quantity.

Alphanumeric.

Drop Ship Activity Date

The date and time the transaction was sent either from Order Orchestration to Order Administration, or from Order Administration to Order Orchestration.

Date: Numeric, 8 positions (in user date format).

Time: Numeric, 6 positions (HH:MM:SS format).

Drop Ship Activity Description

The description of the transaction, as defined in the CSF Transaction table.

System-generated descriptions are:

- `Drop Ship PO created`
- `Drop Ship PO updated`
- `PO available to vendor`
- `Vendor selected PO for processing`
- `Vendor held PO`
- `Vendor released PO`
- `Expected Ship Date Change to XX/XX/XX`, where `XX/XX/XX` is the new expected ship date
- `Revised Ship Date Removed By Vendor`

- `Vendor de-selected PO for processing`
- `PO change acknowledged`
- `Item Shipped XX/XX/XX`, where `XX/XX/XX` is the ship date
- `Order 9999-001 RA # 123 sent to vendor`, where `9999-001` is the order number and ship to number and `123` is the return authorization number
- `Order 9999-001 RA # 123 canceled`, where `9999-001` is the order number and ship to number and `123` is the return authorization number
- `Item Rtnd XX/XX/XX 1 Order 9999-001 RA # 123`, where XX/XX/XX is the return date, 1 is the return quantity 9999-001 is the order number and ship to number and 123 is the return authorization number
- `AP Invoice 123/Line 1 Received`, where `123` is the invoice number and `1` is the invoice line number
- `Cancel request sent`
- `Cancel request confirmed`
- `Cancel request rejected`
- `Address change sent to vendor`
- `Drop Ship PO confirmed on XX/XX/XX`, where `XX/XX/XX` is the date when the update was received in Order Administration; not necessarily the shipment date indicated by the vendor

Vendor Messages?

In addition to system-generated messages, this field displays messages the vendor enters when updating the status of an order line in Order Orchestration's Vendor Portal: The vendor is required to enter a reason message when putting an item on hold or revising the expected delivery date. The vendor can also enter a reason when releasing a line from hold, or independently of any of these changes. The screen displays the reason entered by the vendor for these activities.

No Activity?

No activity message is recorded when the vendor accepts or declines an address change, voids and reprints a pack slip, or enters a reason description in Order Orchestration without making any additional changes to the purchase order line.

> **Note:**
>
> You can confirm shipment of an Order Orchestration drop ship purchase order through the **Receiving Purchase Orders (PORC)** menu option; however, this option is not recommended. Receiving the drop ship purchase order this way updates the status of the purchase order in Order Administration to closed (X) but does not affect the status of the purchase order in Order Orchestration, and subsequent vendor actions for the purchase order are not recorded in Order Administration.

Alphanumeric, 33 positions.

Drop Ship Status

The status of the transaction when it was performed. This is the **Status** from the PO Detail Order table.

Valid values are:

- **Status** blank = The drop ship purchase order is not flagged to be processed by an integrated system. The Supplier Direct Fulfillment integration does not use a blank status.
- **Canceled** (Status **C**) = The drop ship purchase order line has been canceled.
- **Change** = For PO address changes sent to Order Orchestration.
- **Cost Chg** = For PO cost changes sent to Order Orchestration. This status and accompanying message displays only when you access this screen from PO Inquiry (MPOI).
- **Held** (Status **H**) = The drop ship purchase order line has been held by the vendor.
- **In Process** (Status **I**) = The drop ship purchase order line has been selected (pulled or printed) by the vendor for fulfillment.
- **Invoiced** (Status **P**) = The vendor has submitted an invoice for the shipment.
- **Open** (Status **O**) = The drop ship purchase order line has been created in the Order Broker module but not yet selected by the vendor for fulfillment. A purchase order line fulfilled through the Order Broker module might also be in this status if there have been updates to the purchase order, such as if the vendor has held and then released the line.
- **RA Canceled** (Status **N**) = The RA has been Cancelled. Returns are not currently implemented through Order Orchestration’s Supplier Direct Fulfillment module.
- **RA Sent** (Status **A**) = A return authorization has been created for the purchase order line and sent to an integrated system. Returns are not currently implemented through Order Orchestration’s Supplier Direct Fulfillment module.
- **Returned** (Status **R**) = The drop ship purchase order returned merchandise has been received and posted by the vendor. When the vendor posts a return, the return is received and credited (if not already credited) in Order Administration. Returns are not currently implemented through Order Orchestration’s Supplier Direct Fulfillment module.
- **Sent** (Status **E**) = The drop ship purchase order has been created in Order Administration and sent to Order Orchestration’s Supplier Direct Fulfillment module, but the integrating system has not yet acknowledged the purchase order. A purchase order line fulfilled through the Supplier Direct Fulfillment module might also be in this status if you have sent a cost change to Order Orchestration.
- **Shipped** (Status **S**) = The drop ship purchase order line has been shipped by the vendor, closing the purchase order line and order line.

Alphanumeric, 10 positions.

Duty

The amount of duty, if any, charged for the item. The system calculates duty based on the duty rates defined for the country of the ship-to address and the harmonize code defined for the item.

Duty is included in the *Personalization (Special Handling) Charge* for the order.

Numeric, 13 positions with a 2-place decimal.

E

EFTConnect

EFTConnect is leveraged for all communication between Order Administration and Payment Service Providers (PSP) for card-based payment processing.

Payment processes performed includes authorization, capture, authorization + immediate capture, refund, and void transactions.

The following account providers and methods are supported:

- CyberSource for credit cards, debit cards, and Apple Pay and Google Pay wallets through EFTConnect
- Adyen for credit cards, debit cards, Apple Pay and Google Pay wallets through EFTConnect
- External Payment Services for credit cards through EFTConnect.
- Custom Payment Services for credit cards, debit cards and wallets through EFTConnect's Oracle Payment Interface
- PayPal Direct Connection Integration through Order Administration
- Customer Engagement (ORCE) Stored Value Cards through Order Administration
- Custom Payment Services for gift cards through Order Administration's External Payment Service

All account providers and methods supported through EFTConnect are managed through Payment Configurations.

All credit and debit cards must already be tokenized when passed from a calling Merchant Application (i.e., Ecommerce) into Order Administration. Order Administration will not accept plain text credit or debit card numbers. Also, when payments are authorized prior to submitting a new order to Order Administration, additional attributes are now required for the authorization like authorization number, authorization date and authorization amount.

Email Address

The customer's email address. The customer's primary email address, along with any other email addresses for the customer, is stored in the Customer Sold To Email table.

Email Address Validation

Customer sold to email addresses are validated against the Customer Sold To Email table. You can define an email address for a customer using the **Work with Customers (WCST)** menu option.

A valid email address must contain:

- an @ sign and a period (.)
- some text:
  - before the @ sign

  - between the @ sign and the period
  - after the period

Alphanumeric, 50 positions.

Email Opt-In

Indicates the preferred method of correspondence.

Valid values are:

- **O1 (All)** = Email is the preferred method of correspondence.
- **O2 (Order)** = Use email for order-related correspondence only; generate a document for other correspondence.
- **O3 (None)** = Do not use email for any correspondence; generate a document instead.
- **O4 (Don't Ask)** = Do not ask the customer for his/her email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified.

For a new customer, this value defaults from the *Default Opt In/Opt Out Flag (G97)* system control value. You can override the default.

Entered (Merchandise Value)

The merchandise amount total of items entered on orders for the current date.

This total includes:

- Each order line entered on the current date, regardless of the original order date.
- Items added to the order as part of an exchange.
- Items that sell out at order creation.
- Non-inventory items.
- Units added to an existing order line that was originally created on a prior date.

Post-shipment discounts are subtracted from this total.

Cancellations that are subtracted from entered total: Cancellations that take place using a cancel reason flagged to **Reduce demand** are subtracted from the **Entered** totals. For example, you might use a cancel reason flagged to reduce demand if the order line was created through an error, and the customer did not actually want to order the item.

If the cancel reason is not flagged to reduce demand, then the cancellations are included under *Cancelled (Merchandise Value)*. For example, the customer did not want to wait any longer for a backordered item.

This total does not include:

- Items returned during order entry by entering a negative quantity.
- Batch orders that have not yet been accepted.

This is the **Orders entered dollars** in the Order Control Summary table. The system totals the **Orders entered dollars** value for each transaction date in the accounting period to determine the merchandise amount total of orders entered for the accounting period.

Numeric, 20 positions with a 2-place decimal.

Entered (Order Count)

The number of orders entered for the current date, including:

- The total number of ship-to addresses for orders with multiple ship-to's. For example, an order with two ship-to addresses updates the number of orders total by 2.
- Orders which include only sold out items or non-inventory items.

This total does not include:

- Batch orders that have not yet been accepted.
- An order that includes only order lines with negative quantities in order to process a return.

This is the **Orders entered number** in the Order Control Summary table. The system adds the **Orders entered number** value for each transaction date in the accounting period to determine the number of orders entered for the accounting period.

> **Note:**
>
> The order totals reflect initial order entry only. These totals do not include order lines added to an existing order through order maintenance, regardless of the setting of the *Update Demand for Order Maintenance Transactions (C72)* system control value.

Numeric, 9 positions.

Entered (Unit Count)

The number of units ordered so far on the current date.

This total includes:

- Each order line entered on the current date, regardless of the original order date.
- Items added to the order as part of an exchange.
- Items that sell out at order creation.
- Non-inventory items.
- The main set item as well as each component item.
- Units added to an existing order line that was originally created on a prior date.

Cancellations that are subtracted from entered total: Cancellations that take place using a cancel reason flagged to **Reduce demand** are subtracted from the **Entered** totals. For example, you might use a cancel reason flagged to reduce demand if the order line was created through an error, and the customer did not actually want to order the item.

If the cancel reason is not flagged to reduce demand, then the cancellations are included under *Cancelled (Merchandise Value)*. For example, the customer did not want to wait any longer for a backordered item.

This total does not include:

- Units returned by entering negative quantities in order entry.
- Units on batch orders that have not yet been accepted.

This is the **Quantity ordered** in the Order Control Summary table. The system totals the **Quantity ordered** value for each transaction date in the accounting period to determine the number of units ordered for the accounting period.

Numeric, 9 positions.

Entered By

The user ID of the person or process that created the order.

Alphanumeric, 10 positions.

Entered Date

The date the order or order line was entered into the system.

Order Entered Date

This is the **Entered Date** in the Order Header table.

Order Line Entered Date

This is the **Entered Date** in the Order Detail table.

Numeric, 8 positions (user date format).

Entitlement Coupons

Order Administration supports Entitlement coupons to be included from an external system when submitting the order using the Order API as well as providing the ability to retrieve and apply available entitlement coupons based on a customer's loyalty cards during Modern View Order Entry.

Entitlements are a type of coupon code that triggers an offer/deal that is tied to a loyalty program. Entitlements are not set up the same as coupons. First the customer must be set up/enrolled in a loyalty program in Customer Engagement (ORCE), then based on points earned an entitlement coupon is issued, specific to that customer.

Entitlements are supported when:

- *ORCE Customer Integration (L37)* system control value is set to INTERACT
- *Use ORCE Loyalty (M06)* system control value is set to Yes
- *Use ORPE Promotion Engine (M77)* system control value is set to Yes
- The Source Code assigned to the Order has the Price Method set to Regular Plus Reprice
- There is at least one Entitlement coupon for the selected Loyalty Card

Entitlement coupons are retrieved from ORCE for each loyalty card associated to the customer. The entitlement coupon label and icons are different based on the following criteria:

Criteria	Display

When no entitlement coupons are returned for the loyalty card.	No **Entitlement Coupons** labels display.
When at least one entitlement coupon is available for the loyalty card, but no coupons have been selected to be applied to the order.	An info icon before the **Entitlement Coupons available** label is shown. This label opens the **Entitlement Coupon** window.
When at least one entitlement coupon is available for the loyalty card, and at least one coupon has been selected to be applied to the order.	**Entitlement Coupons** label is display-only and there is a count of coupons selected. The **Edit** icon opens the **Entitlement Coupon** window.
After the initial review step, if at least one coupon was selected to be applied but did not qualify for ORPE discount.	**Entitlement Coupons** label is display-only and there is a count of coupons selected. The **Edit** icon opens the **Entitlement Coupon** window and an alert message of ‘Coupons were not applied’ is shown.

The count is shown whether the coupons were applied or not and will increase/decrease immediately after selecting/unselecting coupons in the **Entitlement Coupon** window.

If the loyalty card is changed, the entitlement coupons previously selected will be replaced by any entitlement coupons associated to the new card. Any discounts applied will be re-evaluated during the next Refresh Order

The Entitlements section of the Payments tab train stop is display-only. The label will not be clickable and the edit icon will not display based on the criteria above. The other information displays as outlined above.

Entity

Entities are an important component of the Order Administration sales reporting hierarchy, and can represent the business units within your company (for example, mail order, retail, wholesale). Every sale, return, exchange, discount, and write-off is attributed to an entity. An entity can represent any organization within your company that is held accountable for sales performance.

Estimated Shipping (Freight)

Your “best guess” of the shipping charges on the order. The true shipping charge will be based on the actual weight of items on the order.

Actual (billing amount) Shipping Method

You can enter an estimated shipping charge when using the actual freight method (as designated by selecting **Actual** in the **Freight method** field of the source code). A freight method is a means of calculating shipping charges for an order. This is an order-level freight method that uses the total weight of all the items on the order to determine what the shipping charges will be.

The actual shipping charge is determined during Confirmation or Billing by one of these methods:

- Weighing the package and using the system-calculated the freight charge
- Entering the freight charge manually

The estimated shipping charge is not included in the order totals, so the shipping will be blank (unless there is a freight override) until you determine the actual freight charge.

Numeric, 13 positions with a 2-place decimal.

Exchange Date

The date the transaction that resulted in an exchange occurred. From the **Date Entered** in the RA Header table.

Numeric, 8 positions (in user date format).

Exchange Pricing

Indicates how to price an exchange item added to the order. Possible settings are:

- **Normal Pricing:** The customer pays the normal price for the exchange item.

> **Note:**
>
> This setting defaults if you do not have authority under the *Price Overrides* secured feature, and cannot be changed.

- **Override Price:** You specify the price to use when adding the exchange item.
- **No Charge**: The customer is not changed for the exchange item.
- **Existing Price:** The customer pays the price of the returned item.

> **Note:**
>
> The *Price Override Reason for Same Price Exchanges (D92)* system control value must specify a price override reason in order for you to use the **Existing Price** setting. If this error occurs at the *Return Order Line* page, select **Cancel** and then select **Return** again for the item.

Exchange Status

The status of an exchange.

Valid values are:

- **Created** = The exchange has been created but not yet received.
- **Received** = The exchange has been received but not yet credited.
- **Credited** = The exchange has been credited.

Alphanumeric.

Exchanged (Merchandise Value)

The merchandise amount total of items that were returned in exchange transactions.

This is the **Exchanged dollars** in the Order Control Summary table.

Numeric, 20 positions with a 2-place decimal.

Exchanged (Order Count)

The total number of exchange transactions processed, regardless of whether the exchanges are on the same order. For example, an order with 2 exchanged order lines processed separately updates this total by 2; however, if the same 2 exchanged order lines on a single order are processed in the same transaction, the total updates by 1.

This is the **Exchanges number** in the Order Control Summary table.

Numeric, 9 positions.

Exchanged (Unit Count)

The total number of units returned in exchange transactions.

This is the **Quantity exchanged** in the Order Control Summary table.

Numeric, 9 positions.

Expected Ship Date

The date the item is expected to be available to ship.

For a backordered item: The date a purchase order containing this backordered item is expected. The expected ship date is cleared once you receive the item in Purchase Order Receiving. If you receive purchase orders into suspense, you must run batch purchase order layering from the **Batch PO Layering (BPOL)** menu option in order to update this field.

For a drop ship item: This date displays for drop ship items only if the *Assign Drop Ship Expected Ship Date (I59)* system control value is selected.

Numeric, 8 positions (in user date format).

Expiration Date

The date the credit card is no longer active.

The expiration date may be zero, depending on the setting of the **Require expiration date** flag for the pay type. For example, a gift card typically does not require an expiration date.

> **Note:**
>
> When you unlock and accept an order, Contact Center does not check for expired credit cards.

Numeric, 4 positions (MM/YY format).

Express Bill Ship Via

Allows a user to bill an order or bill an item on an order without the order having to go through the pick slip process. It is used for orders in which an item has already been taken from the warehouse without first entering an order or for unverified returns or exchanges. An Express Bill scenario could be where a customer already has the item delivered to them and the retailer needs to bill them for the item already received. See Ship Via for more information.

Extended Price

The total dollar amount for the item after applying all discounts.

The system uses the following calculation to determine the extended price of an order line: `quantity x unit price`.

Numeric, 13 positions with a 2-place decimal.

F

First Name

The customer's first name.

Alphanumeric, 15 positions.

Fulfilling Location

The location supplying the inventory for the order. This location displays as the **Sourced** location in Order Orchestration.

From the cross-reference record set up through the **Work with Store Cross Reference (WSCR)** menu option.

See *Originating Location* and *Pickup Location* for more information.

Location code: alphanumeric, 10 positions.

Location description: alphanumeric, 40 positions.

Fulfilling Location Quantity

The quantity currently assigned to the fulfilling location. Might be less than the ordered quantity if this is a brokered backorder, the *Use Split Order (L56)* system control value is selected, and the **Allow Split Order and Allow Split Line** preferences in Order Orchestration are also selected.

Numeric, 5 positions.

Future Order

Indicates whether the system will reserve inventory for the item, based on the arrival date entered for the item. No items are reserved for "future orders" until a later date.

Valid values are:

- **Yes** = Item is a "future order" and inventory will not be reserved.
- **No** = Item is a "current order" and inventory will be reserved.

Identifying Future Orders

The system subtracts the *Reservation Lead Days (B27)* from the arrival date entered on the order or for an item. If this date is greater than today's date, the system will not reserve inventory for the order or item, because it is too soon.

Reserving for Current Orders

The Evaluate Future Orders program runs daily to determine whether future orders are eligible for reservation, based on the arrival date calculation. If so, the item detail line is identified as a “current order” and inventory will be reserved.

See the *Arrival Date* field for more information about how the arrival date controls reservation and creating pre-generated picks.

The system updates the **Future Order** field automatically.

Alphanumeric.

G

Gift

Indicates whether the order is a gift order that will be shipped to a second party. If so, no pricing information prints on the pick slip and the buyer receives a gift acknowledgment card to confirm delivery of the gift.

- **Yes** = The order is a gift order.
- **No** = The order is not a gift order.

Alphanumeric.

Gift Card Activation Date

The date and time the gift card was activated; this is the date the system received and processed the approved gift card activation response.

Numeric, 8 positions (user date format).

Gift Card Amount

The initial amount applied to the gift card.

This amount does not reflect the remaining balance on the card, if the card has already been used as payment for a purchase.

Numeric, 7 positions with a 2-place decimal.

Gift Card Issue Date

The date the gift card was processed through billing.

Numeric, 8 positions (user date format).

Gift Card Notification Email

The date a gift card notification (Stored Value Card Notification Email) was sent to the customer. The system sends an email when an approved activation response is received from the service bureau.

Numeric, 8 positions (user date format).

Gift Card Number

The number assigned to the gift card item. For security purposes, only the last four digits of the number display.

If the *Remove Stored Value Card Number After Activation (J22)* system control value is selected, the system replaces the gift card number in the database with the text `REMOVED BY SYSTEM`; in this situation, the gift card number displays asterisks (****) instead of the actual number.

The SECRISK periodic function replaces the first 12 digits of activated gift cards in the database with asterisks (*) when the gift card is older than the *Credit Card Retention Days (K65)*; in this situation, the gift card number displays asterisks (****) instead of the actual number.

Alphanumeric, 4 positions.

Gift Card Vendor Response

The code and description of the activation response received from the service bureau.

Code: Alphanumeric, 10 positions.

Description: Alphanumeric, 40 positions.

Gift Wrap

A flag that identifies whether the item is gift wrapped.

Valid values are:

- **Yes** = Gift wrap the item.
- **No** = Do not gift wrap the item.

> **Note:**
>
> The **Gift Wrap** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Alphanumeric.

Gift Wrap Charge

The price the customer is charged for gift wrapping the item.

Numeric, 13 positions with a 2-place decimal.

Ghost Customer

Customers whose records have been merged with the records of matching customers when you performed a merge/purge.

The ghost customer is the source customer in the merge; records for the source customer are merged with the records for a matching target customer; the system selects the most up-to-date information for target and source and saves these records in the target customer’s record. When performing the merge you can elect to flag a source customer as a ghost on the Work with Source Customers Screen. Ghost customer records are retained in the Customer Sold To table for informational purposes, but ghost customers do not have order history, billing history, mail history or entity information, since all related history records are merged into the source (target customer) records.

Gross Margin

The percentage of the merchandise price that exceeds the total cost. You can use gross margin to determine the profit of an order based on each item's selling price. See Determining Gross Profit for more information.

The *Display Gross Margin (A65)* secured feature controls whether this field is displayed.

Numeric, 5 positions with a 2-place decimal

Group

The number and description of a group of variable set component items, as defined in the Variable Set Groups table. When adding variable set components to an order, you need to select the defined number of items within each defined group.

For example, a variable set contains:

- Group 1: Ties (select 3)
- Group 2: Shirts (select 2)
- Group 3: Pants (select 1)

See **Entering Variable Set Information (WVST)** in the Classic View online help for background.

Group number: Numeric, 3 positions; display-only.

Group description: Alphanumeric, 30 positions; display-only.

GST

The Canadian goods and services tax (GST) that applies to items shipping to Canada. If GST applies, the *Tax* includes this amount.

If the order or line is not subject to GST, the displayed amount is 0.00.

Numeric, 13 positions with a 2-place decimal; display-only.

H

Hidden Shipping

The amount of the merchandise charge that represents hidden freight. Hidden freight, defined at the Item Offer level, is a freight charge that you want to track but not reveal to the customer.

Numeric, 13 positions with a 2-place decimal.

Hidden Tax

The amount of any hidden tax attributed to the item. Hidden tax is used only if the *Tax Included in Price (E70)* system control value is selected; in this situation, a hidden tax amount appears only for orders and items subject to VAT and tax-inclusive pricing.

On orders using tax-inclusive pricing, you charge a different, higher price for an item than an orders subject to conventional tax. Also, any tax amount is not calculated in the standard way and included in the Tax bucket on the order; instead, a hidden tax amount is calculated based on the information you have defined for the customer's country or the item itself, and this amount is “hidden” on the order detail line; this tax is not visible to the customer. Unlike the item tax included in the Tax field, described above, the hidden tax is a unit amount, not an extended amount; you must multiply the hidden tax amount by the item quantity to arrive at the extended hidden tax amount for the order line.

In tracking sales figures, such as in the Order Billing History table and on marketing reports, the system subtracts the hidden tax amount from the item price to determine sales dollars. For example, if the customer pays $10.00 for an item, but the hidden tax amount is $1.50, the system posts the sale as $8.50.

It is possible for the hidden tax for an item to exceed the price you charge the customer if you have defined hidden tax for the item as an amount rather than a percentage of the item price, and you sell the item at a considerable discount or as a free gift.

An item may be exempt from tax, hidden tax, or both based on exemptions defined for the order, customer, state, or item.

Numeric, 13 positions with a 2-place decimal.

Hold Reason

The reason why an order is on hold at the system (order header) level, ship-to level, and/or payment method level.

Hold reasons are defined in and validated against the Order Hold Reason table. You can create and work with hold reasons in the **Work with Order Hold Reasons (WOHR)** menu option. See **Establishing Order Hold Reason Codes (WOHR)** in the Classic View online help.

For more information: See:

- *System-Level (Header) Holds* for a list of holds that can apply to the system (order header) level.
- *Ship-To Holds* for a list of holds that can apply to the order ship-to level.
- *Payment Method Holds* for a list of holds that can apply to the payment method level.

In addition, you can assign *User-Defined Holds* to an order.

Hold Reason Code: Alphanumeric, 2 positions.

Hold Reason Description: Alphanumeric, 30 positions.

Hold Type

The type of hold assigned to the order.

Valid values are:

- **System Hold** = The hold is assigned by the system at the order header level.
- **Payment Method Hold** = The hold is assigned by the system to a payment method on the order.
- **Ship-To Hold** = The hold is assigned by the system to an order ship-to on the order.
- **User Hold** = A user assigned the hold to the order at the order header level.

See *Order Hold Reasons Overview* for more information.

Alphanumeric.

Hold Until

The date when the order is eligible for release through the Release Orders on Time Hold Periodic Function. You can assign a number of days for the system to add automatically when calculating the hold date to each response code you receive from an authorization service.

Numeric, 8 positions (in user date format).

IDCS or OCI IAM

When you use Oracle Identity Cloud Service (IDCS) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management) for password authentication, you define each user ID and password in IDCS or OCI IAM, and use Work with Users in the Classic View of Order Administration to define other user settings, including the default company, locale settings, and authority to menu options and features. See *User Configuration* in the Administration Guide for background.

Client application authentication: See *Manage External Application Access* for background on managing web service authentication for external applications, such as XOffice, using OAuth.

Invoice

The invoice number associated with the order, shipment or credit on the order. Invoice numbers are stored in the Invoice Header table.

The system creates a separate invoice for each shipment made against an order. In addition, the system creates a credit invoice each time a return, cancellation, or overpayment is made against the order.

Invoice Number Assigned When?

If the *Generate Invoice Number at Pick Gen (H80)* or *Generate Invoice # at Pick Gen without Address Match (K81)* system control value is selected, the system assigns the invoice number at pick slip generation if the order is eligible; otherwise, it assigns the invoice number at billing.

Invoice Address?

If the *Capture Addresses for Invoice (J24)* system control value is selected, the shipping and billing addresses for each Invoice Ship To are stored in the Invoice Address table.

Invoice Creation for Ship-for-Pickup Orders

If the *Invoice Ship For Pickup Order Once Intransit (M73)* system control value is selected, the invoice is created for an item on a ship-for-pickup order once the system receives notification from Order Orchestration that the order line is in transit from the sourcing location to the pickup location, has been received at the pickup location, or has been fulfilled. See that system control value for more information.

Invoice Consolidation?

Invoice Consolidation

The setting of the *Consolidated Invoice (B49)* system control value controls whether two shipments to the same billing and shipping addresses on the same billing date are consolidated into the same Invoice Ship To record, producing a single entry on this page.

> **Note:**
>
> In Order Management System 21.0 or higher, or Order Administration, you cannot select the Consolidated Invoice system control value if it is not already selected. If the system control value is currently selected (set to Y) and you deselect it (change it to N or blank), you cannot then change it back to selected. The option to consolidate invoices will be removed at a later date.

Multiple Entries for Same Invoice

The system uses the same invoice number for separate shipments that occur on the same billing date if the *Consolidated Invoice (B49)* system is selected, and:

- The *Invoice Consolidation Method (E29)* is set to **ORDER**, and the shipments were made for separate order ship-tos, or,
- The *Invoice Consolidation Method (E29)* is set to **ORDER SHIP**, and the shipments were made for the same order ship-to, and the billing and shipping addresses were the same for the shipments.

When consolidating invoices as described above, the system creates a single Invoice Header record (and a single invoice number), but separate Invoice Ship To records.

Numeric, 7 positions.

Invoice Date

The date the invoice was created.

Numeric, 8 positions (in user date format).

Invoice Line Number

The number of the invoice line on which an item appears.

Numeric, 3 positions.

Invoice Number of Items

The number of order lines associated with the invoice, across all order ship-tos.

Numeric, 5 positions.

Invoice Print Date

The date the invoice was printed.

Numeric, 8 positions (in user date format).

Invoice Total

The total amount billed or credited on the invoice or invoice payment. Credit invoice amounts include a minus sign.

The total amount that needs to be deposited in order for the invoice to be completely deposited.

The invoice total includes all related:

- merchandise charges
- shipping charges
- tax charges
- personalization charges
- additional charges
- additional shipping charges.

> **Note:**
>
> The invoice total does not include charges for canceled, returned, or sold out items.

Numeric, 13 positions with a 2-place decimal.

Invoice Type

The type of invoice.

Valid values are:

- **Credit:** the invoice was created as a result of a return, cancellation, or overpayment is made against the order.
- **Invoice:** the invoice was created as a result of a shipment made against the order.

Alphanumeric.

Issue Number

An incremental issue number, assigned by some banks when they replace a card because it is lost or stolen. Debit cards might require a start date, an issue number, both, or neither. The **Require issue #** flag for the pay type controls whether an issue number is required or optional.

Alphanumeric, 2 positions.

Item Description

The description of an item.

Alphanumeric, 120 positions.

Item ID

A unique code used to identify an item.

You can create and work with items using the **Work with Items (MITM)** menu option.

For more information: See **Creating and Working with Items** in the Classic View online help.

Alphanumeric, 12 positions.

Item Image

An image of the item. The image displayed is:

- The image defined at the SKU level.
- If an image is not defined at the SKU level, the image defined at the item level displays.
- A generic `IMAGE NOT AVAILABLE` placeholder image indicates if the image URL defined for the item is not a valid URL, or if no image has been defined for the SKU or base item.

> **Note:**
>
> The image is displayed only if the *Use External Item Image (L55)* system control value is selected.

The item information icon is included in the bottom right of the item image or placeholder image if an item information link has been defined. See below.

For more information: See the **Item Image/Info Link Screen** in the Classic View online help for more information on setting up item images.

Item Information Link

The item information icon ( ) in the bottom right of the *Item Image* area indicates that there is a link to a web page providing information on the item. Click the icon to open the related page.

The item information icon is displayed regardless of whether there is an actual item image or an image placeholder. A sample item image placeholder with the item information icon:

The information icon is also displayed at the *Review Order and Verify Order Information* step in order entry to indicate whether discounts or overrides have been applied to order totals. Position your cursor over the icon to display the related message, for example: `Discount applied`.

Item Return Rate

The total percentage of items returned by this customer.

The system uses the following fields in the Customer Sold To Order History table to calculate the item return rate:

```
((Returns LTD + Exchanges LTD) / Sales LTD) * 100 = item return rate
```

Example: If the total value of returned and exchanged items is 100, and the customer's total sales to date is 500, the return percentage is 20, or (`100 / 500) * 100`.

Numeric, 3 positions with a 2 place decimal.

Item/SKU Comment

Any comments defined for an item or SKU in the SKU Comments table whose **Print Code** is set to **Window**. You can create and work with item/SKU comments using the **Work with Items/SKU's (MITM)** menu option. Item/SKU comments display on the *Item SKU Information* window.

You can enter item comments at either the base item level or the SKU level. If you enter both, the comments at the SKU level override the base item-level comments. For example, if item AB100 comes in RED, BLUE, and PINK, and if you enter item comments for the base item and for the RED SKU, the SKU-level comments will appear for the RED SKU only; the base item-level comments will appear for the BLUE and PINK SKU's.

For more information: See the **Work with Items/SKU's (MITM)** menu option for more information on creating and working with item/SKU comments.

Alphanumeric, 50 positions (each line).

Item/SKU Status Message

A message that displays on the *Item SKU Information* window for items that are assigned to the item status code associated with this message.

Item status codes allow you to define the status of an item such as obsolete, discontinued, future ship or soldout. You can assign and item status to an item at the item or SKU level. The SKU status overrides the status of the base item.

For more information: See **Working with Item Status (WIST)** in the Classic View online help for more information on defining an item status code.

Alphanumeric, 50 positions (each line).

K

Keywords

A word to further define an item. Item keywords are used to scan for a specific item based on information that is not found in the item code or item description.

For example, if you sell books and the item number is a code, AN8975H, and the description is the title of the book, "The Outer Ring," you may want to use the author's name as a keyword: "Newbold." This way you can scan for items (books) that have been written by the author, instead of scanning for a specific item (by item code or the title of a specific book).

You can create as many keywords for an item as you want. For example, if you sell books and create the author's name as a keyword for each book, you could further define the item by creating a keyword for the type of book it is, for example, "Science Fiction."

> **Note:**
>
> Keywords are defined at the item level and not at the SKU level.

For more information: See **Working with Item Keywords (WKEY)** in the Classic View online help for more information on defining keywords.

Alphanumeric, 20 positions.

L

Last 4 Digits of Payment Card

The last four digits of the payment card the customer used as payment on the order.

Last 4 Validation

The last four digits is validated against the **CC Last 4** in the Order Payment Method table.

Numeric, 4 positions.

Last Inquiry

The most recent date and time when the BROKER job evaluated whether to request a status update for the order line.

The job uses the *Order Broker Status Update Interval (K10)* system control value to determine how often to check on status.

Not used for orders received from Order Orchestration which did not originate in Order Administration.

Date: Numeric, 8 positions (in user date format).

Time: Numeric, 6 positions (HH:MM:SS format).

Last Name

The last name of the customer.

Alphanumeric, 25 positions.

Last Order

The order date and description of the origin of the last order the customer placed, regardless of the order’s status.

The order date displays in the date format defined for your user ID. For example, if the date format for your user ID is set to YY/MM/DD and you enter 12/12/12, the system recognizes this date as 2012, December 12 and searches for orders that were created on that date.

> **Note:**
>
> This field is blank if the customer has never placed an order.

Order Date: Numeric, 8 positions (in user date format).

Origin: Alphanumeric, 30 positions.

Last Ordered Date

The most recent date when the item was purchased.

Numeric, 8 positions (in user date format).

Alphanumeric, 40 positions.

Lifetime Value

The total merchandise value of the orders placed by the customer, including any backordered or soldout items. This total does not reflect returns created through order entry.

Updates:

- If the *Update Demand for Order Maintenance Transactions (C72)* system control value is selected, this field updates when you add a detail line(s) to an order in Order Maintenance. When you enter an exchange, the price of the exchange (replacement) item is added.
- If the *Update Demand for Order Maintenance Transactions (C72)* system control value is N, this field does not update when you add a detail line(s) to an order in Order Maintenance, including an exchange item.

Numeric, 20 positions with a 2-place decimal.

Location

For orders fulfilled through Order Orchestration, this is the description and address of a location where an item/SKU is available, consisting of:

- description (the **Name** from Order Orchestration)
- street address (up to four lines)
- city
- state
- postal code
- country
- phone number

This information is provided directly from Order Orchestration, and is not derived from the Store Cross Reference table.

> **Note:**
>
> The **Location** label is also displayed in the *Item Availability Table* for a *Warehouse*.

Location Available Quantity

The quantity of the item/SKU reported in the response message as available for pickup in this location. Depending on your settings within Order Orchestration, this quantity may be approximate, or calculated based on probability rules.

- If a location that stocks the item and is within the search radius is flagged in Order Orchestration as **Backorder Available**, it is returned in the search results even if it does not have the item available. In this case, the available quantity listed can be blank, or can be a negative quantity.
- If there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as **Backorder Available**), the *Item Availability (Merchandise Locator)* window displays the locations, but does not indicate the distance, available quantity, open purchase order quantity, or next purchase order date. This situation could occur if, for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower search quantity.

Numeric, 7 positions.

Location Open Purchase Orders

The quantity of the item/SKU reported on open purchase orders for a location; this quantity depends on how the external system calculates the open PO quantity.

> **Note:**
>
> If there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as **Backorder Available**), the *Item Availability (Merchandise Locator)* window displays the locations, but does not indicate the distance, available quantity, open purchase order quantity, or next PO date. This situation could occur if, for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower search quantity.

Numeric, 7 positions.

Location Next PO Date

The date when the next purchase order for the item/SKU is due to be received in a location; this date depends on how the externals system calculates the next PO date.

> **Note:**
>
> If there are locations that stock the item and are within the search radius, but none have the full requested quantity available (and are not flagged as **Backorder Available**), the *Item Availability (Merchandise Locator)* window displays the locations, but does not indicate the distance, available quantity, open purchase order quantity, or next PO date. This situation could occur if, for example, the customer requests 5 units, and none of the locations have more than 4 units available. To display the full information for the displayed locations, search again with a lower search quantity.

Numeric, 8 positions (user date format).

Locked by User

The user ID of the person who was working in the order when it was locked, or the process that has the order locked. From the **User** field in the Order Header table.

Orders can be unlocked through the *Unlock Order* page.

Alphanumeric, 10 positions.

M

Mail

Indicates whether to send the customer mailings from your company. Defaults from the *Default Mail Name (D10)* system control value for a new customer.

- **selected** = Send mail to this customer.
- **unselected** = Do not send mail to this customer.

Main Set Item

Indicates whether the item is a main set item.

- **Yes** = The item is a main set item.
- **No** = The item is not a main set item.

Set items are groups of one or more items that you sell together as a unit. The items that make up a set are referred to as component items. The components can also be sold individually.

Set items are designated by an **S Set** in the **Kit Type** field in the Item table. The individual components associated with the set are defined in the Set table. Each set component must exist in the Item table.

When you place an order for a set item, a detail line is created for the main set item along with each component item. The price of the set is located at the main set item level. Any changes you make to the main set item, for example, changing the order quantity or selling out the set, are also reflected in the component items. Notice that the system underlines the main set item.

When you return a main set item, you can select different return options for the component items. See *Return Order Line Options* for information on returning a set item.

For more information: See **Entering Set Information (WSET)** in the Classic View online help for more information on defining a set item.

Manual Authorization Amount

The amount you wish to manually authorize for a credit card.

Numeric, 13 positions with a 2-place decimal.

Match Code

The match code assigned to the customer. The match code is a code comprised of elements of the customer's name and address, and is used to detect duplicate and fraud customers.

Alphanumeric, 15 positions.

Membership Program

There are two types of memberships: standard and loyalty.

Standard Membership

Standard memberships are programs you can use to generate regular periodic orders for a customer. For example, you might set up a membership program to create an order for a food or beverage item each month. Once you generate an order through a membership, you can ship and bill it like any other order.

Examples of Standard Membership Programs

Example 1: A year of shipments. In this example, the membership includes a different order each month for a year, such as "fruit of the month" or "coffee of the month." The items included in each order, the sequence in which they are shipped, and the pricing are all fixed at the start of the membership, and the customer does not have the option to change or add items. When the predefined number of orders has been generated, the membership closes automatically.

Example 2: Open-ended. The customer chooses the item or items, such as coffee, food items, or other consumables, to receive. Additionally, the customer specifies how frequently the orders should be generated; some prefer monthly shipments, while others receive shipments every two or three weeks. You might include an initial free gift with the first order. Also, the customer can request an additional item to be included in selected rotations, such as every other shipment. The customer pays the current offer price for included items. You leave this type of membership open, and continue generating new orders, until the customer advises you to close the membership.

Example 3: Discount membership. The customer purchases a discount "card" which is good for one year. Any time the customer places an order, this discount applies to the merchandise total.

Loyalty Membership

Loyalty memberships are programs that provide a discount and/or other rewards to customers based on their order history. The background jobs automatically create or deactivate loyalty memberships for customers based on order activity. For example, you could offer customers a 5% discount and free shipping once their total merchandise dollars to date exceeds $500.

You cannot sell or manually create loyalty memberships; loyalty membership activation occurs only when the ORDR_ASYNC or job updates the customer's total merchandise sales or order dollars, and determines that the customer now qualifies for a new loyalty membership program based on customer class or sales, order, or external sales dollars.

When you set up loyalty membership programs, you specify whether to base eligibility on sales or order dollars and whether to subtract activity such as cancellations, soldouts, and returns from the total dollar value required to qualify. You can set up a series of graduated loyalty programs with increasing discounts and rewards. For example, you could have BRONZE, SILVER, AND GOLD loyalty programs, with the system automatically promoting customers from one program to the next as their order history qualifies them.

> **Note:**
>
> A loyalty membership is different from a customer loyalty card. See *Customer Loyalty List* for information on customer loyalty cards.

For more information: See **Membership Overview** in the Classic View online help for more information on memberships and membership processing.

Membership Program ID: Alphanumeric, 12 positions.

Membership Program Description: Alphanumeric, 30 positions.

Merchandise

The total value of the items on the order, invoice, or payment, which is calculated by multiplying the quantity ordered by the item's price. This amount does not include charges for shipping (freight), sales tax (except for hidden tax), or handling.

Numeric, 13 positions with a 2-place decimal.

Message Type

Defines a type of message related to the order. Possible message types are:

- **Order notes:** These are messages added through the *Order Note* window. These messages are for internal users and not exposed to the customer.
- Other order messages types:
  - Gift
  - Pick Slip
  - Quote Form
  - Refund Check

Message

The contents of an order note or gift, pick slip, quote form, or refund check message.

For more information: See *Messages*.

Alphanumeric, 100 positions (up to 60 positions per message line).

Message Date

The date and time when the order note or gift, pick slip, quote form, or refund check message was created or last updated.

Date: Numeric, 8 positions (in user date format).

Time: Numeric, 6 positions (HH:MM:SS format).

Message User

The user ID of the person who created or last updated the order note or gift, pick slip, quote form, or refund check message.

Alphanumeric, 10 positions.

Middle Initial

The customer's middle initial.

Alphanumeric, 1 position.

Misship

An item that was shipped by mistake. A misship might have been included with the correct item in a shipment, or shipped instead of the correct item. See *Creating a Misship* for background.

Modern View

Modern View is a module of Order Administration that provides options including reviewing batch jobs, unlocking orders, managing external applications, and checking gift card balances. Modern View also includes Contact Center.

N

Net Exchange Billing

Indicates whether an invoice is currently pending *Credit Card Net Exchange Billing*. The system considers an invoice pending for credit card net exchange billing if the Invoice Payment Method record contains the **EXC** flexible payment option code in the **IPM FPO Payment Code** and the invoice has not yet been deposited (the **IPM Deposit created date** is blank).

For more information: See **Credit Card Net Exchange Billing** in the Classic View online help for an overview.

No Charge

Indicates whether the item is priced on the order or is given to the customer at no charge:

- **Selected** = There is no charge to the customer for the item.
- **Unselected** = The order line is priced.

If you select the **No charge** field, you must select a *Price Override Reason* and the *Order Line Price* is not enterable.

If you deselect the **No charge** field, the system changes the price for the item to the regular *Order Line Price*, but the price override reason remains on the order line.

> **Note:**
>
> You can change the **No charge** setting for an order line only if you have authority under the *Price Overrides (A23)* secured feature; otherwise, this field is display-only.

O

Offer

The code and description for the catalog, space or television advertisement from which you accept quotes and orders.

The offer defined for the order controls how to calculate shipping and price items. However, if you override the offer for an item (if the customer is ordering from more than one catalog, for example), demand for the item is attributed to the offer associated with the item rather than the order. Demand represents the number and dollar value of orders placed against an offer.

> **Note:**
>
> The system automatically overrides the offer for an item if the *Override Offer on Order Detail Line (D49)* system control value is selected and the item is not sold in the offer used on the order.

Offers are defined in and validated against the Offer table. You can create and work with offers using the **Work with Offers (WOFR)** menu option. See **Working with Offers (WOFR)** in the Classic View online help.

> **Note:**
>
> The **Offer** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Offer Code: Alphanumeric, 3 positions.

Offer Description: Alphanumeric, 30 positions.

Offer Price

The item price as defined for the offer. If the order was subject to VAT and tax-inclusive pricing, in which any tax is included in the **Hidden Tax** field rather than the **Tax** bucket on the order, the offer price presented is the tax-inclusive offer price.

> **Note:**
>
> When a price override reason applies to the order line (whether you enter an override reason manually, or if the system applies the override automatically), the override reason's **Override Item Offer Price** setting controls whether to use the regular offer price.

Customer Price Group Pricing

If you use customer price group pricing, the offer price represents the initial price of the item, based on the **Price Type** defined for the customer price group. See **Customer Price Group Pricing** in the Classic View online help for an overview.

Numeric, 13 positions with a 2-place decimal.

Opt-In Status

The preferred method of correspondence for the primary email address.

Valid values are:

- **Email order and promotion information** = Use email for order-related and promotion-related correspondence.
- **Email order information only** = Use email for order-related correspondence only; generate a document for other correspondence.
- **Do not email** = Do not use email for any correspondence; generate a document instead.
- **Do not ask for email address** = Do not ask the customer for an email address; the customer has already been asked and has declined to provide it. The system does not generate any email correspondence to the customer, even if an email address is specified.

Order Activity

The type of activity performed against the order.

Possible activities are listed below, and typical descriptions indicated. The OTH_TRANSACTION_TYPE code in the ORDER_TRANSACTION_HISTORY table is indicated in parentheses.

Valid values are described below. Related Descriptions are also described if they add additional information. If an Amount is specified for the entry, it is mentioned below as well; otherwise, the Amount is 0.00.

- **Assignment Updated (T):** A task was created or updated. Examples of descriptions include `Task Created/Resolved`, or indication of the rule applied.
- **Authorization (A):** Manual authorization applied for credit card or other activity, such as an authorization reversal. The Descriptions provide further details, for example: `MANUAL AUTH# DETECTED - ABC1234`. The amount authorized is listed in the Amount field.
- **Backorder Cards (K)** = Backorder card evaluation and update to the Order Detail record. The Description provides further details, for example: `1st B/O-line 2, ship date 18/11/19`.

- **Drop Ship Purchase Order (D)** = Drop ship purchase order generated. The Description indicates the purchase order number generated, for example: `DROP SHIP PO# 0000102 CREATED`.
- **Maintenance (M)** = Order was maintained. The system also uses this code when it applies a prorated discount, when activity takes place related to the Order Broker integration, when an order is released from hold, when an order is accepted in batch order entry, when an item is re-reserved. The Amount indicates the order total at the time of maintenance.

> **Note:**
>
> Starting with release 18.0, the system no longer creates Maintenance records for activity updates from Order Orchestration. See above for the individual records created when an order is accepted, shipped, picked, or picked up.

> **Note:**
>
> A separate Order Canceled record is created when an order is canceled in maintenance only if no items have shipped for the order.

- **Notification (L)** = Notification (card, email, or outbound email XML message) generated for the customer or vendor related to the order. The Description provides information on the notification type and customer address, for example: `Ord Conf to first.last@example.com`.

  Narvar notices: When you use the Narvar integration, the **Notification** notification type for a shipment email can be:

  – `Order sent to Narvar:` The Narvar order request message was generated, even if the email address specified was the *Narvar Non-Deliverable Email Address for Shipment Confirmation (M59)*, indicating that the customer should not actually receive the shipment notification.

  – `Failure sending order to Narvar:` The Narvar order request message could not be generated. For example, this message could mean that the configuration for Narvar is not correct.

  – `Order not eligible to be sent to Narvar:` This message can indicate:

    * This is a store pickup order.
    * This is a fulfilling order for an order assigned back from Order Orchestration, if the *Use OROB for Fulfillment Assignment (M31)* system control value is selected. In this case, the shipment notification would be generated under the originating order.
    * This is a retail pickup order that is a fulfilling order for a ship-for-pickup order, and the merchandise was shipped to the store location for customer pickup.
    * The user ID and password specified for Narvar Service through the Work with Outbound Web Service Authentication screen in Classic View are not valid.

    For background and troubleshooting, see Narvar Integration in the Classic View online help, as well as the *Narvar Order Export Errors* page.

- **Order Accepted (3)** = `Store Accepted Order`. Order Orchestration indicated that the fulfilling store location accepted the order or line. The line number is indicated in the Description.
- **Order Canceled (X)** is either:
  - `Order Cancelled`. The non-quote order was canceled before any items were shipped. A few things to note:
    - This entry does not indicate whether the cancel reason used was flagged to update demand.
    - The Amount indicates the total amount of the order including freight, regardless of whether the Recalculate freight option was selected at order cancellation.
    - This entry is created separately for each ship-to on the order.
    - A Maintenance record is also written in addition to the Order Canceled record.
  - `Membership MEMBCODE cancelled`. A customer membership was canceled.
- **Order Level Hold (H)** = Hold applied through order maintenance or as a result of credit checking. The Description indicates the hold reason, for example: `SYS HLD---SYSTEM HOLD MISC FRAUD`.
- **Order Message (7)**: Order Message Added. This message indicates that a customer note, gift message, pick slip message, quote form message, or refund check message was added. See *Messages* for more information.
- **Order Picked (4)** = Store Picked Order. Order Orchestration indicated that the assigned fulfilling location (store or warehouse) picked the order or line.
- **Order Picked Up (6)** - Customer Picked Up Order. Order Orchestration indicated that the customer has picked up the order from the store location.
- **Order Shipped (5)** = Store Shipped Order. Order Orchestration indicated that the fulfilling location (store or warehouse) shipped the order or line. The line number is indicated in the Description, for example: `Ln#: 2 Store Shipped Order.`
- **Pick BO cancel failed** - Invalid Reason (no Amount indicated; written when a backorder cancellation reason passed in the CWPickIn XML Message was not numeric)
- **Pick BO cancel reason was truncated** (no Amount indicated; written when the backorder cancellation reason passed in the CWPickIn XML messages was a number longer than 2 positions)
- **Pick Gen Error (!)** = Problem Generating Pick. A stock allocation error occurred. The line number is indicated in the Description, for example: `Problem Generating Pick - Order line 2`.
- **Pick Slip Generated (P)** = Pick Gen. A pick slip was generated. This message is written when you use cart/bin picking. The Description indicates the pick control number, warehouse, and cart/bin, for example: `Pk 212 Whs 1 Ct/Bn 111/108/2`.

> **Note:**
>
> Starting with release 18.0, the system no longer creates a Pick Gen (P) record when a stock allocation error occurs. Instead, it creates a Pick Gen Error record.

- **Pick Voided (V)** = Pick ticket voided through Work with Interactive Reservation or Reprinting and Voiding Pick Slips. The Description indicates the original and new pick control number; for example, `Pick 166 reprinted as pick 184`.
- **Price Override (W)** = Price override. The price of an item was overridden. The system does not write a price override history message here when it applies the Default Price Override Reason (B35). The Description indicates the order line updated; for example, `User price override - Order line 1`. The Amount indicates the unit price of the item after applying the override.
- **Quote Maintenance (@)** = Quote was maintained. The Amount indicates the order total when the quote was maintained.

> **Note:**
>
> If the quote was canceled during maintenance, a maintenance (M) record is also created, indicating the cancel reason.

- **R/A Maintenance (*)** = A return authorization was created, received, or credited through Working with Return Authorizations. The Description indicates `Order was maintained through R/A.` The Amount is the refund amount.
- **Refund Processed (F)** = Refund processed or changed. The Description indicates the type of update; for example, `Refund has been released or CC Crd for inv#101 processed`.
- **Released from Hold (R)** = The order was released from hold. The Description indicates the hold reason description and part of the user ID or process that released the order, for example: `Order 131 released from PAY TYPE HOLD`.

  When you release the ship-to only hold for a multi-recipient order, all the ship-tos are released, and a separate activity record is written for each ship-to.The activity record for the ship-to only hold release is written for ship-to 1.
- **Return Authorization Processed (N)** = R/A Credit pending processing. A return or exchange was created for the order or an order line. The Amount indicates the total amount of the credit.
- **Shipment (S)** = An order shipment or credit billed. Multiple entries are written when a pick slip is confirmed and processes in billing. Sample Descriptions might be:
  - Pick slip confirmation: `Pick# 212 Mtr 0.00 Wgt 0.00`, `Via 1 T#, Via 1 T#ABCD1234`, and `Pick# 0000212 Billed on Invoice# 000012`. The shipment total is the Amount indicated for the entry related to the invoice creation.
  - Express-billed shipment or return: `EXPRESS BILLED ON INVOICE # 0000127`.
- **Sold Out (O)** = Item sold out automatically based on the value in the S/O field for the item, and a soldout notification generated. The Description indicates the line number, for example: `S/O card generated-line 3`.

- **Subscription (B)**: The subscription extract was generated. The Description indicates the issue number and subscription code, for example: `Issue# 002 sent for SUBSCRIPTION/`.
- **System Update (Y)** = Can be written with the following Descriptions:
  - `CSV removed for security` (no Amount indicated)
  - `Suppress refund updated to on p/t 4` (no Amount indicated)
  - `Award amt not redeemed-card number not found` (Amount indicated)
- **Unreserved (U)** = Interactive reservation. Indicates that an item was reserved or unreserved manually, such as through Working with Interactive Reservation or Reprinting and Voiding Pick Slips. The Description indicates the line number that was unreserved, for example: `Order Line 1 unrsv'd w/BO qty of 1`.
- **Upsell Promotion (E)** = Promotion discount applied. The Descriptions indicate both the type of discount, and the promotion name and description, for example: `Total Prorated Order Level Discount` and `10%OFF - 10% OFF ORDER`, where 10%OFF is the promotion name and 10% OFF ORDER is the promotion description. The Amount indicates the discount amount applied.
- **User Defined (Z)** = The order activity was received through the generic order transaction history API. The Description and Amount are from the inbound message.

> **Note:**
>
> The Order Activity page does not display any ROL (reserved order line) error, but the Display Order History screen in the Classic View of Order Administration does display this activity.

Alphanumeric.

Order Activity Amount

The total order amount following the order activity, including merchandise, freight, tax, handling, etc.

For an order cancellation (before any items have shipped), the dollar amount listed includes freight, regardless of whether the Recalculate freight option was selected at order cancellation.

See *Order Activity* for more information.

Numeric, 13 positions with a 2-place decimal.

Order Activity Date

The date and time when the order activity occurred.

Date: Numeric, 8 positions (in user date format), updated by the system.

Time: Numeric, 6 positions (HH:MM:SS format), updated by the system.

Order Activity Description

The description of the order activity. See *Order Activity* for more information.

Alphanumeric, 150 positions.

Order Activity User

The user ID of the person who performed this activity against the order.

- If the system performs the activity automatically, such as releasing prepaid orders on time hold, the user ID is the name of the person who started the ASYNC processing program (background jobs).
- If the activity took place through a system process or an API, the user ID indicates the process, API, or your default user.
- **EXTERNAL** defaults for order transaction history created through the Generic Order Transaction History API.

Alphanumeric, 10 positions.

Order Broker Date

The date and time the transaction was sent either from Order Orchestration to Order Administration, or from Order Administration to Order Orchestration.

Date: Numeric, 8 positions, in user date format.

Time: Numeric, 6 positions, HH:MM:SS format.

Order Broker Status

The current status of the Order Orchestration request. Possible statuses are:

- **A - Accepted** = The location assigned to fulfill the order has accepted it, or has accepted the order and is preparing it for shipment or pickup. This status occurs for brokered backorder (delivery or ship-for-pickup) or store pickup order types. The status displays as `Accepted` or `Picked` in Order Orchestration.
- **C - Closed** = You canceled the request when its status was R (Ready), before it was submitted to the Order Broker. This status occurs for brokered backorder (delivery or ship-for-pickup) order types.
- **E - Error** = The Order Broker has returned an error response. This status can occur for any order type.
- **F - Picking** = The pick slip has been printed. This status occurs for retail pickup, delivery, or ship-for-pickup (pick gen/drop ship) order types. The status displays as `New_Order` or `Picked` in Order Orchestration.
- **G (Resend Fulfilled)** = Delivery: The Order Status Update request message to change the status in Order Orchestration to fulfilled did not generate a response message from Order Orchestration, possibly because message authentication failed or communication is down. In this case, the BROKER_ORD job re-sends the Order Status Update request the next time it runs.
- **H (Resend Intransit)** = Ship-for-pickup: The Order Status Update request message to change the status in Order Orchestration to intransit did not generate a response message from Order Orchestration, possibly because message authentication failed or

communication is down. In this case, the BROKER_ORD job re-sends the Order Status Update request the next time it runs.

- **I - In Process** = The order was received from the Order Broker and created without error. This status occurs for retail pickup or delivery order types. The status displays as `Accepted` in Order Orchestration.
- **J - Rejected** = The order was sold out after creation in Order Administration. This status occurs for retail pickup or delivery order types. The status displays as unknown (order reassigned to new fulfilling location) in Order Orchestration.
- **K - Acknowledged** = The Order Broker has received the order request, assigned a request ID, selected a fulfilling location (brokered backorder), and created the order in its database. This status occurs for brokered backorder (delivery or ship-for-pickup) or store pickup order types. The status displays as `New_Order` in Order Orchestration.
- **L - Partial Fulfill** = The customer has picked up one or more items on the order, but not the complete order. This status occurs for retail pickup, ship-for-pickup (pick gen/drop ship), or store pickup order types. The status displays as `Partially Fulfilled` in Order Orchestration.
- **N - New** = The order was received from the Order Broker but is in error. This status occurs for retail pickup or delivery order types. The status displays as `Polled` in Order Orchestration.
- **O - Posted** = Order Orchestration has submitted the order or order line for enterprise fulfillment. This status displays as `Posted` in Order Orchestration. With this status, you do not have the option to edit or sell out the order line. See **Enterprise Order Integration** in the Classic View online help for background.
- **P - Polled** = The assigned fulfilling location has polled the Order Broker for new orders and been notified of this order. This status occurs for brokered backorder (delivery or ship-for-pickup) or store pickup order types. This status displays as `Polled` in Order Orchestration.
- **R - Ready** = This status occurs for brokered backorder (delivery or ship-for-pickup) or store pickup order type.
  - For a brokered backorder order type: The request is ready to be sent to the Order Broker, but the BROKER process has not yet generated the request message.
  - For a store pickup order type: Order Administration attempted to send the order to the Order Broker, but Order Orchestration has not responded. In this case, Order Administration retains the order information in the Store Pickup tables until communication with Order Orchestration resumes.
- **S - Received by Store** = The order has been received by the store location but not yet picked up by the customer. This status occurs for brokered backorder (ship-for-pickup), retail pickup or ship-for-pickup (pick gen/drop ship) order types. This status displays as `Received` in Order Orchestration.
- **T - In Transit** = This status occurs for brokered backorder (ship-for-pickup), retail pickup or ship-for-pickup (pick gen/drop ship) order types.
  - For a brokered backorder (ship-for-pickup) order type: The location fulfilling the order has shipped the merchandise to the store for pickup.
  - For a retail pickup or ship-for-pickup (pick gen/drop ship) order type: You have confirmed shipment of the order to the store for pickup.

  - This status displays as `Intransit` in Order Orchestration.
- **U - Unfulfillable** = This status occurs for brokered backorder (delivery or ship-for-pickup) or store pickup order types.
  - For a brokered backorder order type: the Order Broker has not found a location able to fulfill the order based on the rules set up in Order Orchestration. When it receives a response indicating that the Order Broker cannot fulfill the order, Order Administration returns the order line to standard backorder processing.
  - For a store pickup order type: the assigned store location has rejected the order. This status displays as `Rejected` in Order Orchestration.
- **V - In Transit Polled** = The store location has polled the Order Broker for an update on the order. This status occurs for brokered backorder (ship-for-pickup), retail pickup or ship-for-pickup (pick gen/drop ship) order types. This status displays as `Intransit Polled` in Order Orchestration.
- **W - Waiting** = The order request message has been sent to the Order Broker, but Order Administration has not yet received a response. This status occurs for brokered backorder (delivery or ship-for-pickup) order types. This status displays as unknown in Order Orchestration.
- **X - Completed** = This status occurs for all order types.
  - For brokered backorder (delivery or ship-for-pickup) order type: The fulfilling location assigned by the Order Broker has shipped the item to the customer or the customer has picked up the entire order from the store. When Order Administration receives a status update indicating that the order line has been shipped, it bills the order line and saves the ship via and tracking number, if indicated in the response message, to the Order Transaction History table.
  - For delivery order type: You have confirmed shipment of the order to the customer.
  - For retail pickup, ship-for-pickup (pick gen), or store pickup order type: The customer has picked up the entire order.
  - This status displays as `Fulfilled` in Order Orchestration.
- **Y - Pending Cancel** = This status occurs for brokered backorder (delivery or ship-for-pickup), store pickup, retail pickup, delivery, or special ship-for-pickup order types.
  - For brokered backorder order type: You have canceled the order line (including the Order Broker request), or you have canceled just the Order Broker request at the Work with Order Broker Screen, but you have not yet received a confirmation of the cancellation from the Order Broker.
  - For store pickup order type: You have canceled the order, but you have not yet received a confirmation of the cancellation from the Order Broker.
  - For retail pickup, delivery, or special ship-for-pickup order type: You have voided the pick slip through the generic pick in API and the *Cancel Reason (Pick In) (L86)* system control value specifies a cancel reason, but you have not yet received a confirmation of the cancellation from the Order Broker.
- **Z - Canceled** = You have requested that the Order Broker order be canceled, and the Order Broker has confirmed the cancellation. This status occurs for brokered backorder (delivery or ship-for-pickup), store pickup, special ship-for-pickup, or retail pickup order types. This status displays as `Canceled` in Order Broker.

Order Date

The processing date for the order; this is the **Order Date** in the Order Header table. Typically, the order date represents the date the order was created; however, a user can override this date during order entry to an earlier or future date.

Order Date Calendar

Select the calendar icon to display a calendar window that you can use to select a date to default to the **Order Date** field.

- If the **Order Date** field is blank, the calendar defaults to the current month and date; otherwise, the calendar defaults to the date defined in the **Order Date** field.
- Use the left and right arrows to display the previous month and next month.
- Select the **Month** link to select a specific month for the currently selected year.
- Select the **Year** link to select a specific year for the currently selected month.
- Select the **Today** link to display the current month and year.

When you select a date from the calendar, the system defaults this date to the **Order Date** field.

Numeric, 8 positions (in user date format).

Order Discount

The total discount applied to the order. The total discount is calculated by comparing the selling price with the item/SKU offer price. If you use a price override on any of the order lines, or if it defaults from the *Default Price Override Reason (B35)* system control value:

If the price override reason code's **Override item offer price** field is selected, the **Order discount** includes any discounts that reduce the selling price from the price override amount applied to the order line; however, it does not include the amount of the price override itself. For example, if an accompanying item normally priced at $2.00 is added to the order at no charge, the $2.00 is not included in the order discount amount.

If the price override reason code's Override item offer price field is unselected, and:

- **The existing item/SKU offer price for the item is overridden:** the Order discount includes the difference between the original item/SKU offer price and the final selling price, including the price override and any other discounts.
- **There is no item/SKU offer price for the item:** the order detail line does not affect the Order discount total.

Displayed on the *Order Summary Panel* panel at the *Review Order and Verify Order Information* step of order entry, only if the *Display Discount on Order Recap Screen (D38)* system control value is selected.

When editing an order batch when ORPE is enabled and an order has a offer applied, the edit/accept batch calls ORPE to verify that changes made when you fixed the order in error did not affect the deals applied. It is possible that the deal will no longer apply or maybe changes made will make a new deal apply.

Discount records are written with the type of ORPE and those records are deleted when the batch is rejected, an order is deleted or an order line is deleted. In addition, if you change a line - change qty or price the order and shipping discount records are deleted when you press ACCEPT. They are then REBUILT when you run the edit/accept batch process again even if the order is still in error.

Note:

Discount records with type of external are not deleted unless the order line is deleted, the order is deleted or the batch is rejected. If you change a line, the external discount record associated with that line is not changed in any way. Additionally, if you change the shipping, the external discount records are not changed in any way.

Numeric, 13 positions with a 2-place decimal; display-only.

Order Email

The email address defined for the order and stored in the Order Header Extended table. The order-level email address is separate from the email addresses maintained for the customer sold to, permanent ship-to customer, or other email addresses in the system.

How an Order-Level Email Address Defaults to an Order

The system uses the following hierarchy to default the order-level email address in order entry:

- If the customer sold-to has a primary email address, use that email address; otherwise,
- No order-level email address defaults in order entry.

You can accept the default, enter a different email address, or clear the email address.

Note:

If you clear the email address and the *Suppress Email Address Search (J09)* system control value is selected, the system does not generate order-related emails for the order.

Alphanumeric, 50 positions.

Order Line Activity

The type of update performed against an item detail line.

Order line activity codes are defined in the Order Line Activity table; you can create and work with order line activity codes in the **Work with Order Line Activity Codes (WOLA)** menu option. See **Working with Order Line Activity Codes (WOLA)** in the Classic View online help.

System-delivered order line activity codes that are displayed in the *Order Line Activity* window are described below. The activity code identifying the type of activity in the Order Line History table is indicated in parentheses:

- **Add** (A): Includes adding an order line through maintenance or exchange, or through a system process, such as Process Item Substitutions (PSUB). The add reason code, if any, is listed; see *Add Reason* for a discussion.The quantity added is listed.

- **Change** (G): Changes to the order line, including Changes to the order line, including:
  - increasing the quantity. An increase in quantity is displayed as a positive number.
  - decreasing the quantity when the cancel reason code used had the **Reduce demand** flag selected, regardless of whether you used the Cancel or Change option. A canceled quantity is displayed as a negative number, and the cancel reason code description is not listed. Canceling a partial quantity with a cancel reason code that had the **Reduce demand** flag unselected creates an **Item Partially Cancelled** entry, described below.
  - changing the price or other information for the order line. When the change does not affect the quantity, no quantity is displayed.
- **Discount** (D): A discount was applied to the order line after shipment. The quantity of the item discounted is displayed.
- **Exchange** (E): The exchanged quantity is displayed as a positive number. The exchange reason code description is also displayed; see *Exchange Reason* for a discussion.
- **Express Bill** (B): The quantity express billed and the ID of the user who started the async jobs are indicated.
- **Item Canceled** (C): A quantity of the item on the order line is canceled during order maintenance or through a system process, such as Process Item Substitutions (PSUB). This includes canceling using a cancel reason code not flagged to reduce demand. The quantity canceled is displayed as a negative number. The cancel reason code description is not displayed; see *Cancel Reason* for a discussion.
- **Item Held** (J): The order line was put on hold. The open quantity on the line when it is held is displayed.
- **Item Partially Cancelled** (#): A partial quantity was canceled, either through the Cancel option or through the Change option, if the cancel reason code's **Reduce demand** flag was unselected. A partial cancel can also occur when a partial quantity of the line was shipped, and then the remaining quantity or the entire order was canceled. The quantity canceled is displayed as a negative number, and the cancel reason code description is also listed; see *Cancel Reason* for a discussion.

  > **Note:**
  >
  > If the cancel reason code had the **Reduce demand** flag selected, the activity is listed as a **Change** rather than as Item Partially Cancelled.

- **Item Partially Shipped** (P): A partial quantity of the item was shipped. The quantity shipped and the ID of the user who started the async jobs are indicated.
- **Item Released from Hold** (+): The line was released from held status. The quantity on the order line when it was released is indicated.
- **Item Sold Out** (O): When an item sells out automatically in order entry or creation, the quantity displayed is a positive number. If the item was sold out through **Sell Out**, the quantity is negative and the name of the user who sold out the item is listed. When an item sells out through Process Auto Soldouts, the quantity

displayed is negative; also, in this case, the user ID displayed is for the user who submitted Process Auto Soldouts.

- **Item Unreserved** (9): The item was unreserved through Work with Void/Reprint Picks, Interactive Reservation, or the PickIn message. This message is also written when you create a store pickup order through the order API or through Modern View order entry. When the line is unreserved through the PickIn message, the default user ID is displayed. This record is not created through the Void Pick Batch option. The unreserved quantity is displayed as a negative number.
- **Order Line Message Added** (8): An order line message was added. The open quantity on the line when the message was written is displayed. A single order line history entry is created each time you accept your entries, regardless of whether you create a single order line message or multiple message lines.
- **Return** (R): Displays the quantity returned as a negative number. Also displays the return reason description; see *Return Reason* for a discussion.
- **Shipment** (S): Displays the quantity shipped. Also, the user ID displayed is for the user who started the async jobs.
- **Sale** (X): Not currently implemented.

Alphanumeric.

Order Line Activity Date

The date when the order line activity occurred.

Numeric, 8 positions (in user date format).

Order Line Activity Quantity

The quantity of the item affected by the order line activity. For example, `3-` indicates that three units of the item were canceled. Activities that do not affect the order quantity, such as changing the pricing of the order line, do not display a quantity here.

See *Order Line Activity* for background.

Sold Out Activity Quantity

When you review a soldout line on the *Order Line Activity* window, you can determine how the item was sold out as follows:

- If the item was sold out through the **Sell Out** option, the quantity is negative and the name of the user who sold out the item is listed.
- If the line sold out automatically in order entry because there was a soldout control code assigned to the item, the line history has a positive quantity, and the name of the user who entered the order is listed.
- If the line was sold out through **Process Auto Soldouts (MASO)**, the quantity is negative and no user name is listed.

Numeric, 5 positions.

Order Line Activity Reason

The reason the activity was performed against the item detail line.

Exchange Reason

The reason for the customer to exchange one item for another.

Exchange reasons are defined in and validated against the Exchange Reasons table; you can create and work with exchange reason codes using the **Work with Exchange Reason Codes (WEXR)** menu option. See **Establishing Exchange Reason Codes (WEXR)** in the Classic View online help.

Numeric, 3 positions.

Cancel Reason

The reason for canceling the units or reducing the quantity. A cancel reason code is not stored for soldout cancellations, whether you sell out the item by selecting Sold-out in order entry or order maintenance, or through the **Process Auto Soldout Cancellations (MASO)** menu option; however, the *Auto Soldout Cancel Reason (C20)* system control value is displayed here if a backordered line was canceled at billing because the **Canc B/O (Automatically cancel backorders)** flag for the order was selected.

Cancel reason codes are defined in and validated against the Cancel Reason table; you can create and work with cancel reason codes using the **Work with Cancel Reason Codes (WCNR)** menu option. See **Establishing Cancel Reason Codes (WCNR)** in the Classic View online help.

Numeric, 2 positions.

Return Reason

The reason for the customer to return an item.

Return reasons are defined in and validated against the Return Reason table; you can create and work with return reason codes using the **Work with Return Reason Codes (WRTR)** menu option. See **Establishing Return Reason Codes (WRTR)** in the Classic View online help.

Numeric, 3 positions.

Add Reason

The reason for adding an item to the order. The system requires an add reason code if:

- The *Require Reason for Lines Added in Order Maintenance (D75)* system control value is selected, or
- The **Required reason code** field for the item offer or SKU offer is selected.

Add reason codes are defined in and validated against the Add Reason table; you can create and work with add reason codes using the **Work with Add Reason Codes (WADR)** menu option. See **Establishing Add Reason Codes (WADR)** in the Classic View online help.

Alphanumeric, 5 positions.

Order Line Activity User

The user ID of the person who performed the order line activity.

The user ID does not display if you sell out an item through the **Process Auto Soldout Cancellations (MASO)** menu option rather than order entry or order maintenance.

Alphanumeric, 10 positions.

Order Line Coupon

Indicates whether a coupon is redeemed for an item on an order line.

- **Selected** = The customer is using a coupon for the item.
- **Unselected** = The customer is not using a coupon towards the purchase of the item.

If you select the **Coupon** field, you must enter the amount in the *Order Line Coupon Amount* field. The dollar amount of the coupon will be subtracted from the price of the item and *Coupon Item Price will be assigned to the order line as the pricing method.

> **Note:**
>
> - For a coupon to be applied to an item, the *Pricing Values (B31)* system control value must use the **COUPON/ITEM** pricing method (or it should be near the top of the pricing hierarchy) or you should use *Best Way Pricing (A78)* so that the system can give the item to the customer at the lowest available price.
> - The **Coupon** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Order Line Coupon Amount

The value of the coupon being applied against an item on an order line. The system subtracts the coupon amount from the item's price.

> **Note:**
>
> - You must select the **Coupon** *Order Line Coupon* field in order to apply a coupon against an item.
> - The **Coupon Amount** field displays only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Order Line Message

A message defined for the order line.

Order line messages apply to the specified order line only and not any other order or order line.

Alphanumeric, 60 positions.

Order Line Message Date

The date and time when the order line message was created or most recently updated.

Date: Numeric, 8 positions (in user date format).

Time: Numeric, 6 positions (HH/MM/SS format).

Order Line Message Print Location

A code that controls whether the order line message prints.

Valid values are:

- **Print on both invoice and pick slip** = Print the message on the invoice and pick slip.
- **Print on invoice only** = Print the message on the invoice only.
- **Print on pick slip only** = Print the message on the pick slip only.
- **Nowhere** = The message is informational and does not need to be printed.

Order Line Message Template

Text you wish to automatically default to the **New Message** field when adding a message to an order line. All order line message templates set up in Order Administration (WMSG) are available for selection, regardless of the **Print Code** setting defined for the template. This field is not included if no order line message templates have been defined.

Order Line Message User

The user ID of the person that created or last updated the order line message.

Alphanumeric, 10 positions.

Order Line Number

A number the system assigns to each item as it is added to an order ship-to. A quote or order can have up to 999 lines.

Numeric, 3 positions.

Order Line Price

The per unit price of an item, after applying all discounts and repricing. The order line price reflects any coupon discount amount or dollar discount by offer or source if the *Prorate Dollar Discounts and Coupons (D90)* system control value is selected.

You can change the order line price only if you have authority under the *Price Overrides (A23)* secured feature; otherwise, this field is display-only.

When you initially add an item to an order in *Order Entry*, the price is from the default *Current Offer (A33)* system control value; however, when you advance to the *Review Order and Verify Order Information* step, the price is from the offer associated with the source code specified at the *Enter or Verify Customer Information* step.

When you change the order line price or set the line to *No Charge*, you need to specify the *Price Override Reason*.

Numeric, 13 positions with a 2-place decimal.

Order Line Quantity Ordered

The number of units of the item being ordered on an order line. You can order up to 99,999 units of a single item on one order line.

The *Maximum Order Quantity (C60)* system control value controls the maximum number of units you can order on an order line; additionally, the *Allow Maximum Order Quantity Override (A70)* secured feature controls whether individual users can exceed this maximum.

You can increase the quantity ordered at the Edit Order Line page, but you cannot decrease the quantity.

If an increase in quantity qualifies for an accompanying item as defined for the Item Offer or SKU Offer, the accompanying item is added to the order.

Numeric, 5 positions.

Order Line Status

The current status of the item on the order. Possible statuses are:

- **Open** = The order line is currently open.
- **Express Bill** = You have entered the order using an express-bill ship via, but the BILL_ASYNC process has not yet processed the invoice.
- **Canceled** = You have canceled the item using a cancel reason code that is not flagged to reduce demand.
- **Error** = The order line is currently flagged with an error, and the order is suspended in an order batch.
- **Held** = The order line is currently held. You can hold a line on an open order to prevent it from printing on a pick slip, even if it is available.
- **Soldout** = The item has been sold out. An order line can be sold out:
  - manually in order entry or maintenance through the **Sell Out** option.
  - automatically in order entry or maintenance, based on the soldout control code assigned to the item.
  - through the Process Auto Soldouts option.
- **Closed** = The item has been shipped, canceled with a cancel reason flagged to reduce demand, or partially shipped and the remainder of ordered quantity canceled.

Order Message

A message defined for the order, or for a ship-to on the order.

Order messages apply to the specified order only and not any other order for the customer.

Types of order messages are order notes, gift messages, pick slip messages, quote form messages, and refund check messages.

These order messages apply to the order and not to a specific item on the order. See *Order Line Message* for information on messages specific to an item on the order.

Messages added through the *Order Note* window are for internal users and not exposed to the customer.

See *Messages* for more information.

Alphanumeric, 100 positions.

Order Message Date

The date and time when the order message or note was created.

Date: Numeric, 8 positions (in user date format).

Time: Numeric, 6 positions (HH/MM/SS format).

Order Message Template

Text you wish to automatically default to the **New Message** field when adding a message or note to an order.

The system defaults the message text to the message line; however, you can override the default message text or add to the default message text. For example, if you select to default `Happy Birthday`, you may wish to modify the message line to read `Happy Birthday, Mom!`

See *Messages* for more information.

Order Message User

The user ID of the person that created or last updated the order message or note.

Alphanumeric, 10 positions.

Order Number

A unique, system-assigned number to identify an order.

Order numbers are stored in the Order Header table.

Numeric, 8 positions.

Order Quantity

The quantity of the item to remain open when you are performing a cancellation on an order line. If you enter 0, the entire quantity is canceled.

Numeric, 5 positions.

Order Source

The ID of the workstation where the user was working when creating the order, or the name of the process that created the order; for example, the workstation is E-COMMERCE for orders created through the Generic Order Interface (Order API).

If the order was created in Contact Center, this is the user ID of the person who entered the order.

Alphanumeric, 10 positions.

Order Status

The overall status of the order, across all ship-to recipients.

Valid values are:

- **Canceled** = An order is canceled when you have canceled each item individually or the entire order.
- **Closed** = An order is closed when all the items on the order are shipped or canceled.

- **Error** = An order is in error if it was received through the Order API and did not pass all order validation, or if the session where it was being created in *Order Entry* closed unexpectedly.
- **Held** = An order is held when the system applies some type of hold to the order or a user places an order on hold by typing a user-defined hold reason code in the **Hold reason** field.
- **Open** = An order that is not on hold, closed, canceled, or suspended.
- **Quote** = The order represents a pre-order quote that has not yet been converted to a standard order.
- **Suspended** = An order is suspended while it is being entered into the system.

Order Total

The total amount the customer owes for the quote or order, including:

- Merchandise
- Freight
- Additional freight charges
- Taxes
- Handling
- Duty
- Additional charges

The total does not include charges for canceled, returned or sold out items.

Numeric, 13 positions with a 2-place decimal.

Order Type

A description that defines how the order was received, such as web, phone, or mail.

Sometimes labeled the **Origin**.

You can create and work with origins using the **Work with Order Types (WOTY)** menu option. See **Establishing Order Types (WOTY)** in the Classic View online help.

Ordered Date

The date when the item was added to the order. Typically, the ordered date is the same as the date when the order was created; however, the item may have been added after initial order entry or added to the order through an exchange.

Numeric, 8 positions (in user date format).

Ordered Quantity

The total number of units of the item ordered.

A minus sign indicates a return created by entering a negative quantity in order entry.

This field is blank when you cancel an order line using a cancel reason flagged to reduce demand.

Numeric, 5 positions.

Origin (Order Type)

A description that defines how the order was received, such as web, phone, or mail.

You can create and work with origins using the **Work with Order Types (WOTY)** menu option. See **Establishing Order Types (WOTY)** in the Classic View online help.

Alphanumeric, 30 positions.

Original Expected Ship Date

The original due date on the purchase order.

The original expected ship date is calculated by adding the **Lead days** for the vendor item and the *Drop Ship Lead Days (H36)* to the order date; however, if the **Arrival date** on the order is later than this date, the **Arrival date** is used as the **Original expected ship date**.

A drop ship purchase order is not eligible for creation through the **Select Vendors for Drop Ship Processing (MDSP)** menu option until the current date plus the number of **Lead days** in the vendor item table equals or exceeds its due date.

Numeric, 8 positions, in user date format.

Original Payment Method

The original payment method used on the order. This may differ from the current payment method associated with a refund.

> **Note:**
>
> If the original payment method was deactivated when you maintain the order in Contact Center, generating a refund, Contact Center automatically selects an active payment method on the order to apply the refund amount.

Code: Numeric, 2 positions.

Description: Alphanumeric, 30 positions.

Originating Location

The location, store or warehouse, where the order originated. This location displays as the **Placed** location in Order Orchestration.

From the cross-reference record set up through the **Work with Store Cross Reference (WSCR)** menu option.

See *Fulfilling Location* and *Pickup Location* for more information.

Location code: Alphanumeric, 10 positions.

Location description: Alphanumeric, 40 positions.

ORPE

Order Administration is now integrated to the Oracle Retail Promotion Engine Cloud Service (ORPE). When configured, Order Administration will bypass some of the inherent promotional pricing options during order entry, making a REST call to provide the order (cart) details for evaluation by ORPE. The promotion engine performs a comprehensive evaluation of the cart, identifies the applicable offers, and responds with the discounted price applied for qualifying merchandise lines. If shipping rewards are included in the response, Order Administration performs additional validation and calculations before they are applied to the order.

See Oracle Retail Promotion Engine Integration in the Integration and Import/Export Guide for more information.

P

Panel

A type of window that opens from the right of the page and partially covers the current page. A panel may contain additional windows.

Payment Category

Within EFTConnect, indicates the types of payments supported. Categories available are **Credit or Debit** and **Wallets**.

Payment Method

A method of payment on the order.

You can create and work with pay types in the **Work with Pay Types (WPAY)** menu option. See **Working with Pay Types (WPAY)** in the Classic View online help.

Code: Numeric, 2 positions.

Description: Alphanumeric, 30 positions.

Credit Card Payment Method

When viewing an existing payment on an order, the last four digits of the credit card number displays after the payment method description in parenthesis. For example: `VISA (1234)`. This is the **CC Last 4** from the Order Payment Method table.

Check Payment Method

When viewing an existing payment on an order, the check number displays after the payment method description in parenthesis. For example: `Check (12345)`. This is the **OPM Check Number** from the Order Payment Method table.

Code: Numeric, 2 positions.

Description: Alphanumeric, 30 positions.

Payment Transaction Status

The status of the transaction.

Authorization Transactions

Valid values for an authorization are:

- Sent

- Authorized
- Declined
- Expired (updated by pick slip generation only)
- Authorized/Unused
- Mismatch Auth/Deposit (created for authorizations during deposits)
- Voided

A blank status indicates that the transaction has not yet been sent to the service bureau.

Deposit Transactions

Valid values for a deposit transaction are:

- Confirmed
- Deleted
- Forced
- Manual Confirm
- Prepaid
- Resubmitted
- Sent
- Unconfirmed
- Written Off

A blank status indicates that the transaction has not yet been sent to the service bureau.

Reversal Transactions

The status is populated with the Description matching the response code configured in WASV for that reversal transaction.

Payment Total

The total for the pay method, including merchandise, freight, additional freight, additional charges, handling and tax.

Numeric, 13 positions with a 2-place decimal.

Payment Transaction Amount

The amount of the transaction.

Authorization Transaction

This is the amount the service bureau authorized to be charged on the credit card.

Authorization Reversal Transaction

This is the amount to reimburse to the card.

Deposit Transaction

This is the amount deposited.

Numeric, 13 positions with a 2-place decimal.

Payment Transaction Approval Date

The date when the transaction was approved by the service bureau.

Authorization Transaction

The date when the authorization transaction was sent to the service bureau.

Authorization Reversal Transaction

The date and time when the authorization reversal was approved by the service bureau.

Deposit Transaction

The approval date is blank for a deposit transaction.

Date: Numeric, 8 positions (in user date format).

Time: Numeric, 6 positions (HH:MM:SS format).

Payment Transaction Create Date

The date and time when the transaction was created.

Authorization Transaction

The date and time when the authorization transaction was sent to the service bureau.

Authorization Reversal Transaction

The date and time when the authorization reversal was created against the card payment. This is the date when a cancellation was processed against the card payment or when the card was deactivated.

Deposit Transaction

The date when the deposit history record was created. This is the date when the invoice pay method was deposited. The deposit created date ensures that the deposit is not sent again.

Deposit transactions display a date but not a time.

Date: Numeric, 8 positions (in user date format).

Time: Numeric, 6 positions (HH:MM:SS format).

Payment Transaction Send Date

The date and time when the transaction was sent to the service bureau.

Authorization Transaction

The date you transmitted the authorization to the authorization service.

Authorization Reversal Transaction

The send date is blank for authorization reversal transactions.

Deposit Transaction

The date when the deposit history record was created. Deposit transactions display a date but not a time.

- For debit transactions, this is the date when the invoice pay method was deposited. The deposit date ensures that the deposit is not sent again.
- For credit transactions, this is the date of the first refund associated with the deposit transaction.

Date: Numeric, 8 positions (in user date format).

Time: Numeric, 6 positions (HH:MM:SS format).

Payment Transaction Status

The status of the transaction performed against the payment method.

Authorization Status

This is the status of the authorization as updated by the system. Valid values are:

- **Not Sent** = Not sent yet.
- **Sent** = Sent, but not received.
- **Authorized** = Successful authorization.
- **Declined** = Failed authorization.
- **Expired** = Authorization expired; a transaction updates to this status only during pick slip generation.
- **Authorized/Unused** = Successful authorization, but the authorization has not been applied to the card. This may occur if the card failed address verification (AVS).
- **Mismatch Auth/Deposit** = The authorization does not match the deposit transaction; a transaction updates to this status only when a card is authorized during deposit processing.
- **Voided** = Authorization voided.

Authorization Reversal Status

The status of authorization reversal, as updated by the system. This is the description for the response code received by the service bureau for the reversal transaction.

Deposit Status

The status of the deposit as updated by the system. Valid values are:

- **Not Sent** = The deposit has not yet been sent to the service bureau.
- **Confirmed** = The service bureau confirmed the deposit. The status in the CC Deposit History table is **C**.
- **Deleted** = The user deleted a rejected deposit. The status in the CC Deposit History table is **D**.
- **Forced** = The deposit was rejected, but was forced through deposit (the **Forced deposit** field for the authorization service is selected). The status in the CC Deposit History table is **F**.
- **Manual Confirm** or **Manual Confirmed** = The user manually confirmed the deposit through Submit Rejected Deposits. The status in the CC Deposit History table is **M**.
- **Prepaid** = The user entered a prepaid adjustment amount. The status in the CC Deposit History table is **P**.

- **Resubmitted** = The deposit was resubmitted for deposit. The status in the CC Deposit History table is **R**.
- **Sent** = The deposit is in the process of being sent to the service bureau. The status in the CC Deposit History table is **S**.
- **Unconfirmed** = The deposit is unconfirmed by the service bureau. The status in the CC Deposit History table is **U**.
- **Written Off** or **Write Off** = The user wrote off a rejected deposit. The status in the CC Deposit History table is **W**.

Payment Transaction Type

A description of the transaction performed against the payment method.

- **Authorization** = An authorization transaction from the Authorization History table.
- **Deposit - Purchase** = A deposit transaction from the Deposit History table.
- **Deposit - Return** = A credit transaction from the Deposit History table.
- **Reversal** = A reversal transaction from the Auth History SVC Reversal table.

Personalization (Special Handling)

The code and description of the personalization defined for the item, such as monogramming or engraving.

You can define a personalization code and description, and whether the personalization is a **Special Handling Type** of **standard** or **custom**, in the **Work with Additional Charge Codes (WADC)** menu option. See **Establishing Additional Charge Codes (WADC)** in the Classic View online help.

- **Standard personalization** (the **Special handling type** is **Standard**) supports entry of free-form text instructions.
- **Custom personalization** (the **Special handling type** is **Custom**) supports entry of specific fields, with default entries and validation. You use the **Work with Custom Special Handling Formats (WSHF)** menu option for format setup. See **Establishing Custom Special Handling Formats (WSHF)** in the Classic View online help.

For more information: See *Personalization Overview*.

Personalization Code: Alphanumeric, 2 positions.

Personalization Description: Alphanumeric, 25 positions.

Personalization (Special Handling) Charge

The cost of any personalization, or special handling, on the quote or order, such as monogramming or engraving, and any gift wrapping charges.

Determining the Personalization Charge

The system determines the personalization charge by:

- If a **Special handling price** is specified for the item offer or SKU offer, use this price; otherwise,
- If a **Default price** or **Default price%** is specified for the special handing format, use this price (this option is available for custom special handling only).

You can enter a personalization charge at the *Add Personalization* or *Edit Personalization Information* window.

The personalization charge can be zero.

The *Evaluate Special Handling Charges by Order Line (D67)* system control value controls whether to multiply the charge amount by the order line quantity.

Numeric, 13 positions with a 2-place decimal.

Personalization (Special Handling) Custom Charge

The charge to apply the custom personalization option to an item if it is set up as a Feature/option. See *Personalization Overview* for a discussion.

Personalization (Special Handling) Custom Label

A custom option that can be performed on an item assigned to custom personalization. The name of the label is defined in the Special Handling Format table; you can create and work with custom special handling formats using the **Work with Special Handling Formats (WSHF)** menu option. The response for the option displays as the value for this field; see *Personalization (Special Handling) Custom Response*. For example, if the **Custom Label** is **Color**, the value in this field may be `BLUE`.

Label: Alphanumeric, 15 positions.

Personalization (Special Handling) Custom Response

The value entered for a *Personalization (Special Handling) Custom Label*. If the *Display Special Format Response Descriptions (E90)* system control value is selected, the response description displays rather than the response itself.

Alphanumeric, 45 positions.

Personalization (Special Handling) Instructions

Free-form instructions or notes explaining what needs to be done to personalize the item. This field is available if you are applying standard personalization to an item.

Note that instructions entered in the Classic View of Order Administration are all upper case, while instructions entered in Contact Center can be upper and lower case. Also, instructions entered in the Classic View of Order Administration as separate lines are concatenated in Contact Center into a continuous line.

Phone Number

The customer's telephone number. Three types of phone numbers can be assigned for a customer but only one phone number can be added per phone number type. The type is shown in parenthesis after the phone number.

1. home phone number that is always displayed (even when not populated)
2. business phone number that also supports a phone extension
3. mobile or fax phone number as determined by Third Phone Number Type (L53) system control value.

If more than one phone number is defined for the sold-to customer and only one is shown such as in a one-time ship-to order, the system uses the above hierarchy to determine which phone number to display.

If less than three phone numbers are defined for the sold-to customer, the **+ Add Phone** hyperlink displays in the Edit Sold-To screen to allow a phone number to be added. If all three numbers have been assigned, the **+ Add Phone** hyperlink is not shown but the phone numbers can be edited or deleted.

The phone number displays the telephone number format defined for the country (as defined in Work with Country (WCTY)) on the customer's address.

Store Pickup and Ship for Pickup Orders

If you use the Order Broker integration and the order is a store pickup order or ship for pickup order, the phone number is the store's phone number.

> **Note:**
>
> The **Phone Number** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Alphanumeric, 14 positions.

> **Note:**
>
> While the phone number field is alphanumeric, Contact Center allows only numbers and characters in this field, and not letters. For example, you can enter `(508) 555-0100` but not `1800ABCDEFG` in this field.

Pick Control Number

A number the system assigns to each batch of picks.

Pick Control Number Validation

Pick control numbers are validated against the **PCH Control #** in the Pick Control Header table.

Numeric, 7 positions.

Pickup Location

The location where the customer picks up the order. This location displays as the Pickup location in Order Orchestration.

From the cross-reference record set up through the **Work with Store Cross Reference (WSCR)** menu option.

See *Originating Location* and *Fulfilling Location* for more information.

Location code: alphanumeric, 10 positions.

Location description: alphanumeric, 40 positions.

Postal Code

The postal code assigned to the customer's mailing address. This code represents a delivery area.

Alphanumeric, 10 positions.

Prefix

The optional honorific preceding the customer's name, such as Dr. or Ms.

Not all pages and windows display the customer's prefix. Also, the prefix, even if defined, is not displayed if:

- The customer's name has not been defined; that is, the customer is identified by company name only.
- The name is displayed in last name, first name, middle initial format.

The prefix can include special characters.

Alphanumeric, 3 positions.

Price Discount Method

The type of price discount applied to an order line at the *Discount Order Line* window.

Valid values are:

- **Discount Price** = Update the unit price on the order line to the entered discount price.
- **Discount% Off Price** = Reduce the unit price on the order line by the entered discount%.
- **No Charge** = Update the unit price on the order line to zero.

Price Method

The method the system used to calculate the price of an item, but before applying an order-level discount, such as a source code discount percentage.

Valid values, and the corresponding code stored in the Order Detail table, are:

- 1 `Coupon item price`
- 2 `Customer discount%`
- 3 `Contract price`
- 4 `Special source price`
- 5 `Column price`
- 6 `Quantity break price`
- 7 `Offer price`
- A `Repriced-prorated discount`
- B `Quantity Price Matrix Customer Override`
- C `Use item cost`
- D `Regular Plus Reprice`
- E `Price code`
- F `Customer Price Group`
- G `BOGO`

- H `Promote`
- I `Repriced-qty break/item`
- J `Repriced Customer Price Group Best Price`
- K `Price table default`
- L `Price Table Level Ovr`
- M `Promo Item`
- N `No charge` (with cost tracking; source code definition)
- O `No charge/no cost` (source code definition)
- P `Regular Hierarchy`
- Q `Repriced-qty break/offer`
- R `Price override` (includes entering as no charge in order entry)
- T `Price table premium`
- U `Upsell Item`
- V `Repriced-volume discount`
- X `Qty Price Matrix`
- Y `Price table`
- Z `Repriced-item category promotion`

Alphanumeric, assigned by the system.

Price Override

The amount that the customer pays for an item. Required when you select an *Exchange Pricing* setting of **Override Price** at the *Return Order Line* page.

Numeric, 13 positions with a 2-place decimal.

Price Override Reason

The reason that the price of an item was changed or the customer was given the item at no charge. The system automatically assigns a price override reason code when a free gift or promotional item is added to the order.

For quotes, the system assigns the price override reason code defined in the *Price Override Reason for Quotes (K75)* system control value to each detail line.

You must select a price override reason when you set an order line to *No Charge* or change the *Order Line Price*. *Authority under the Price Overrides (A23) secured feature is required.*

Price override reason codes are defined in and validated against the Price Override Reason Code table. You can create and work with price override reason codes using the **Work with Additional Charge Codes (WADC)** menu option. See **Establishing Additional Charge Codes (WADC)** in the Classic View online help.

Code: Numeric, 1 position.

Description: Alphanumeric, 30 positions.

Printed Date

The date when the pick slip for the item was printed.

Numeric, 8 positions (in user date format).

Printed Quantity

The total number of units for which a pick slip has been printed. This number is reduced if the pick slip is voided or when a shipment of the item is confirmed.

Order Orchestration?

If the order line has been assigned to the Order Broker for fulfillment (brokered backorder) or if the customer is picking up the order at a retail location where the inventory is already available (store pickup), the order line is flagged as backordered and has a printed quantity here that is equal to the ordered quantity. In this case, the order line is flagged as containing a drop ship item until the order line is fulfilled and the printed quantity is reduced.

Numeric, 5 positions.

Promotion Code

A code identifying a promotion that you can apply to an order. You can set up promotion codes to:

- discount merchandise (percentage, prorated discount, or price override)
- apply a negative additional charge
- add free gifts
- discount freight
- discount additional freight
- override the ship via on an order

Alphanumeric, 7 positions.

PST

The Provincial Services tax (PST) that applies to items shipping to Canada. If PST applies, the *Tax* includes this amount.

If the order or line is not subject to GST, the displayed amount is 0.00.

Numeric, 13 positions with a 2-place decimal; display-only.

Purchase Order Number

The customer’s purchase order number.

For example, several departments within a company are requisitioning supplies. Each departmental manager creates a purchase order for these supplies, has it approved, and gives the purchase order to the office manager. The office manager places one order, with different ship-to addresses for each purchase order.

Each purchase order represents a ship-to customer on the system, because, although the sold-to customer is the company placing the order, the recipient of each order differs by department (and purchase order number).

The department manager may inquire into the status of his or her order by the purchase order number.

> **Note:**
>
> The **Purchase Order Number** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Alphanumeric, 15 positions.

Purchase Status

The status of the order line associated with the item purchased by the customer.

Valid values are:

- **Canceled** = The item was canceled using a cancel reason that was not flagged to reduce demand.
- **Closed** = The item was shipped, or canceled with a cancel reason code flagged to reduce demand. This status can also indicate a return that was created by entering a negative quantity, rather than by processing a return against a shipped order line.
- **Error** = You received the order through the Order API, and there are one or more errors related to the item. In this case, the order is in a Suspended status until you fix the error(s).
- **Express Bill** = An express-bill order has been submitted to the Billing Async job, which has not yet processed the record.
- **Held** = The item, but not necessarily the order, was put on hold to prevent printing it on a pick slip.
- **Open** = The order line containing the item is open. An open line might be partially or fully backordered, or have had a partial shipment or cancellation take place.
- **Sold-Out** = The item was sold-out, either by a user in the system or automatically by the system.

Purchase Total

The total merchandise value of the orders placed by the customer, including any backordered or sold-out items. This total does not reflect returns created through order entry.

Purchase Total Updates

- If the *Update Demand for Order Maintenance Transactions (C72)* system control value is selected, this field updates when you add a detail line(s) to an order in Order Maintenance. When you enter an exchange, the price of the exchange (replacement) item is added.
- If the *Update Demand for Order Maintenance Transactions (C72)* system control value is N, this field does not update when you add a detail line(s) to an order in Order Maintenance, including an exchange item.

Purchase Total Cancellations

This total reduces when you cancel an order only if you enter a cancel reason set to update demand; otherwise, the orders amount remains the same and the Cancels amount increases.

Numeric, 13 positions with a 2-place decimal.

Q

Quantity to Cancel

The total number of units of the item that will be canceled. This total does not include any units that have been shipped, sold out, or previously canceled. Display-only.

Numeric, 5 positions.

Quantity to Return

The quantity of the item to return or exchange.

Numeric, 5 positions.

Quote Origin

Yes indicates the order originated from a pre-order quote.

Quoting allows you to create a pre-order for a customer listing the items the customer wishes to order and the estimated order totals should the customer agree to place the order. The system does not reserve inventory or perform background async updates for the quote until it is converted to an order. Optionally, the system assigns an expiration date to a quote, indicating how long the estimated quote is valid before it expires.

> **Note:**
>
> The **Quote Origin** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

For more information: See Entering Pre-Order Quotes.

R

Recalculate Shipping

Controls whether the system recalculates freight for the item based on changes to its quantity or price.

- **Selected** = Recalculate shipping for the item based on changes to its quantity or price.
- **Unselected** = Do not recalculate shipping for the item based on changes to its quantity or price.

The setting of the **Recalculate Shipping** field defaults based on the setting of the *Recalculate Freight Default (F62)* system control value.

> **Note:**
>
> The **Recalculate Shipping** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Receive Catalog Mailings

Defines whether the customer receives future catalogs. Valid values are:

- **Yes** (selected) = Mail catalogs to the customer
- **No** (unselected) = Do not mail catalogs to the customer

Received Date

The date you received the customer's returned merchandise into your warehouse for a return or exchange transaction. If you received on multiple dates, the most recent date displays.

Numeric, 8 positions (in user date format).

Received Quantity

The total quantity of the returned items that you have received into your warehouse for a return or exchange transaction.

Numeric, 5 positions.

Recent Activity Description

In most cases, additional detail is available under *Order Activity* or *Order Line Activity*.

- **References to items with SKU's:** Just the base item code is included in the recent activity description, the SKU information, if any, is not indicated. For example, if the order included PEN BLUE and PEN RED, and the PEN BLUE was canceled, the recent activity description might indicate Item Shipped: PEN (Ship-To: 1).
- **Customer Picked Up Order:** Order Orchestration indicated that the customer has picked up the order from the store location.
- **Item Added:** An item was added to the order, through an maintenance or exchange, or through a system process, such as Process Item Substitutions (PSUB) The base item code and the ship-to number are indicated.
- **Item Canceled:** An order line was canceled with a cancel reason whose **Reduce demand** flag is unselected. The base item code and the ship-to number are indicated.
- **Item Discounted:** A discount was applied to a shipped order line. The base item code and the ship-to number are indicated.
- **Item Exchanged:** An exchange was processed. The base item code and the ship-to number are indicated.
- **Item Held:** An item was placed on hold. The base item code and the ship-to number are indicated.
- **Item Partially Canceled:** A partial quantity of an order line was canceled with a cancel reason code whose **Reduce demand** flag was unselected. The base item code and the ship-to number are indicated.

- **Item Partially Shipped:** A partial quantity of an order line was shipped. The base item code and the ship-to number are indicated.
- **Item Released from Hold:** An item was released from hold. The base item code and the ship-to number are indicated.
- **Item Returned**: A return was processed. The base item code and the ship-to number are indicated.
- **Item Shipped:** A shipment or credit billed. The base item code and the ship-to number are indicated.
- **Item Sold Out:** An item sold out, either automatically during Billing, through the Sellout option in order entry or order maintenance, or automatically when the order line was created. The base item code and the ship-to number are indicated.
- **Item Unreserved:** An item was unreserved through Work with Void/Reprint Picks, Interactive Reservation, or the PickIn message. This record is not created through the Void Pick Batch option. The base item code and the ship-to number are indicated.
- **Maintenance:** The order was maintained. Multiple maintenance activities performed in a single session can be consolidated into a single entry here.
- **Order Canceled:** Used when:
  - The non-quote order was canceled before any items were shipped. This entry does not indicate whether the cancel reason used was flagged to update demand.
  - A membership item on the order has been canceled. This does not necessarily mean that the entire order was canceled.
- **Order Level Hold:** An order hold was applied through order maintenance or as a result of credit or fraud checking.
- **Order Line Message Added:** An order line message was added. In this case, additional detail is available under the *Order Line Messages Table* rather than under *Order Activity*.
- **Order Message Added:** An order message was added.
- **Order Released from Hold:** The order was released from hold.
- **Pick Generated:** A pick slip was generated. The same message is used for a drop ship pick slip or purchase order.
- **Pick Voided:** A pick slip was voided through Work with Interactive Reservation or Reprinting and Voiding Pick Slips.
- **Problem Generating Pick:** A problem occurred during generation of a pick slip. A stock allocation error occurred.
- **Quote Maintenance:** The quote order was maintained.
- **R/A Maintenance:** A return authorization was created, received, or credited through Working with Return Authorizations.
- **Refund Processed:** A refund was processed or changed.
- **Store Accepted Order:** Order Orchestration indicated that the fulfilling store location accepted the order or order line.
- **Store Picked Order:** Order Orchestration indicated that the assigned fulfilling location picked the order or line.

- **Store Shipped Order:** Order Orchestration indicated that the fulfilling location shipped the order or line.
- **Task Created/Resolved:** A workflow task assignment was created or updated.

Recipient

The customer receiving the merchandise on the order. An order can contain multiple recipients.

If you use the Order Broker integration, the recipient customer for a store pickup or ship-for-pickup order is the store code and store name of the store location where the customer will pickup the order.

Ship-To Last Name: Alphanumeric, 25 positions.

Ship-To First Name: Alphanumeric, 15 positions.

Company Name: Alphanumeric, 30 positions.

Store Code: Alphanumeric, 10 positions.

Store Name: Alphanumeric, 40 positions.

Refund Additional Charges

Indicates whether the system should refund the additional charges on the order.

Because an order's additional charges are billed out with the first shipment on the order and a return is always performed against an invoice, when you specify to refund additional charges, the customer may not receive the intended refund if you are performing the refund against a subsequent invoice.

Refund Amount

The amount to be refunded.

The tax amount included in the refund amount is based on the tax rate that was effective when the item was shipped.

A negative sign indicates a balance due from the customer.

Numeric, 13 positions with a 2-place decimal.

Refund Date

The date the transaction that resulted in a refund occurred.

Numeric, 8 positions (in user date format).

Refund Duty Charges

Indicates whether to refund duty charges assessed on international shipments. The duty charges for an order are generally included in the Handling field, but you can review the duty charge for an individual item by selecting Change for the item in order entry or Maintenance, or Display for an item in standard Order Inquiry.

You can review the actual amount of duty that has been billed or refunded for an item on a particular invoice in standard Order Inquiry on the Invoice Detail Charges Screen. To display this screen, select Invoices to review invoices, select Display Details for an invoice to display details, then select Detail Charges for the invoice detail.

Refund Hold Until Date

The date when the system will release a refund from hold.

Numeric, 8 positions (in user date format).

Refund On Hold

Indicates whether the refund is on manual hold.

A refund may be on hold because:

- The amount of the refund exceeds the maximum amount specified in the **Work with Pay Types (WPAY)** menu option.
- You placed the refund on hold through the **Work with Refunds (WREF)** menu option.

Valid values are:

- **Yes** = The refund is on manual hold.
- **No** = The refund is not on manual hold.

Refund Personalization

Controls whether the system will credit the customer for special handling charges assessed on the item being returned.

Refund Sequence Number

If a Refund is not associated to a Return Authorization, the Refund Sequence Number is shown instead.

Numeric, 3 positions.

Refund Shipping

Indicates whether to refund the shipping charge for the return. If you select this field and the source code uses a header level freight method, the system refunds a proportionate amount of freight for the items being returned. Otherwise, if you select this field and the source code uses a line level or flat freight method, the system refunds the freight charge for the returned items on the order.

> **Note:**
>
> Depending on the freight calculation method defined for the order, selecting the **Refund Shipping** flag does not necessarily mean that there will be a freight refund. For example, if the freight charges are $10.00 for any order totals over $75.00, and returning an item does not bring the order total below $75.00, then no freight is refunded.

Refund Status

The current status of the refund.

Valid values are:

- C = Cancelled
- H = Held
- I = ChannelAdvisor pending
- N = Cancel pending
- O = Open
- P = Processed
- T = Written off
- W = Writeoff pending

Refund Type

Represents a type of refund.

Valid values are:

- **CC Credit** = A credit adjustment is sent to the credit card authorization service.
- **Check Credit** = The customer receives a refund check.
- **Gift Card Credit** (SVC credit) = Customer receives a new gift card for the refund amount that can be used a payment towards a new purchase.

How Pay Type Determines Refund Type

The pay type that a customer uses on an order determines the type of refund received, depending on how you have defined the pay type.

Payment category: When you create a pay type, you must assign it to one of five payment categories. Each payment category automatically produces a certain refund type, as follows.

- **Payment category Cash/Check (1)** produces **Refund Type Check**.
- **Payment category Credit Card (2)** produces **Refund Type Credit Card Credit**.

Alternate refund type: When you define an alternate refund type for a pay type, the system automatically generates refunds of the alternate refund type.

The system accepts only gift card or cash/check alternate refund types.

Alternate refund category: When you define an alternate refund category for a pay type, you give yourself the option of changing the refund to the type that corresponds to this category.

The system accepts only cash/check alternate refund categories. However, you can change any type of refund to a gift card credit.

Reject Date

The date when a deposit was rejected. From the Deposit History record.

Rent

Indicates whether to rent this customer's name to other companies. Defaults from the *Default Rent Name (D11)* system control value for a new customer.

- **selected** = Rent this name.
- **unselected** = Do not rent this name.

Replacement Item

A code that identifies the item the customer is requesting in exchange for a return.

Alphanumeric, 12 positions.

Replacement Quantity

The total of the exchange item to ship to the customer.

Numeric, 5 positions.

Request ID

A unique ID number assigned by Order Orchestration to identify the order line or order:

- If you do not split orders, each individual brokered backorder item submitted to the Order Broker receives a unique request ID, and the Order Broker treats it as a separate order; otherwise, lines on an order create a single request ID in Order Orchestration when the system submits the lines to the Order Broker in the same request message.
- If the *Create Separate Picks for Ship for Pickup Orders (L89)* system control value is selected, Order Administration submits each order line to Order Orchestration as a separate order, and Order Orchestration assigns each its own request ID.
- Store pickup orders cannot be split.

The request ID is blank for requests whose status is:

- Z: Canceled
- C: Closed
- J: Rejected
- R: Ready
- W: Waiting

The field might also be blank for requests in **E: Error status**, depending on the nature of the error. For example, requests that the Order Broker did not receive and create successfully are not assigned request ID’s.

> **Note:**
>
> Although the field in Order Administration is up to 25 positions, Order Orchestration does not support a request ID longer than 10 positions.

Numeric, 25 positions.

Reserved Date

The date when the units of the item were reserved. This date remains blank for items flagged as a non-inventory item.

Numeric, 8 positions (in user date format).

Reserved Quantity

The total number of units of the item reserved. This number is reduced when an item is canceled, confirmed, or unreserved using the **Interactive Reservation (MIRV)** menu option.

The system may reserve inventory from a single warehouse or over multiple warehouses, depending on whether a warehouse code is defined for the order line or order header and the values in the *Ship Complete from 1 Warehouse (B16)* system control value.

Influences on Reservation

Reservation occurs only if:

- The *Immediate Reservation (A64)* system control value is selected.
- The *Use OROB for Fulfillment Assignment (M31)* system control value is unselected.
- The order is not a future order -- the system- calculated date is less than or equal to today's date (see the *Arrival Date* field).
- The order is not a zone reservation order -- zone reservation is used for weather-sensitive items, which are not reserved until pick generation.
- Both the customer and customer class are not flagged for *Bypass Reservation*.
- The quantity ordered of the item is not greater than or equal to the **SKU Reserve Quantity** for the Item.
- The **Reservation Freeze** field for the Item/warehouse is not selected.
- Reservation can be performed against the warehouse, meaning the warehouse is flagged as **Allocatable**. However, if the *Reserve from Non-Allocatable Warehouse (J25)* system control value is selected, the system allows you to reserve against a non-allocatable warehouse.
- Inventory is available.

When the Item Cannot be Reserved

If no quantity is available of the item, the reserved quantity for the item detail line is zero. The system backorders the requested order quantity and updates the detail line with a backorder reason of `No allocate` and updates the backorder warehouse on the order detail line.

When the Item is Partially Reserved

If the entire quantity ordered is not available for the item, the quantity available is reserved and the quantity unavailable is backordered. The system updates the detail line with a backorder reason of `Not enough avail in whse`.

Using Interactive Reservation

If you use the **Work with Interactive Reservation (MIRV)** menu option, no inventory is reserved until you run the Interactive Reservation program to disperse inventory manually to preferred customers or customers who buy in high volume. Interactive Reservation can be used to reserve inventory for an item if the quantity ordered exceeds the **Reserve Quantity Limit** defined in the Item table.

Numeric, 5 positions.

Return Authorization Number

The unique number (RA_REFERENCE_ID) the system assigns to a return authorization on an order. You can create a return authorization in Order Maintenance when you are expecting a customer to return an item, or through the *Return Order Line* or *Return Ship To* page.

If a Refund is not associated to a Return Authorization, the Refund Sequence Number is shown instead.

Numeric, 3 positions.

Return Date

The date the item was returned. This is the date when you first created the return authorization.

This field is blank for a return created by entering a negative quantity in order entry.

This field is updated when the return is received.

Invoice Return Date

The most recent date when the customer returned any quantity of the item billed on this invoice. This field displays only on a credit invoice.

Numeric, 8 positions (in user date format).

Return Disposition

A code that identifies how a returned item will be handled by the system, in terms of whether the return updates inventory and the warehouse and location to which the item will be returned. You must enter a valid return disposition code when performing any type of return, such as a straight return, entering an exchange item, etc.

Return disposition codes are defined in and validated against the Return Disposition Values table; you can create and work with return dispositions using the **Work with Return Disposition Values (WRDV)** menu option.

Affect Inventory?

If the return disposition code affects inventory (meaning that the item will be returned into active inventory and update the on-hand quantity in the specified location), you must specify the warehouse and location where the item will be returned. If the disposition code is set up to affect inventory and return to the primary location, the system will check for the primary location for the item. If one is available, the system will return the item automatically to this warehouse location. If one is not available or if the disposition code is not set up to receive returns in the primary location, the system will receive the return in the warehouse and location defined for the return disposition; however, you can override these values to return the item to an alternate location. If the item/location does not exist, the system will create a record in the Item/Location table automatically.

Return to Primary Location?

The system checks for a primary location and warehouse in the Item table. If a location and warehouse is defined in the Item table, the system returns the item automatically to this warehouse location. If a location has not been defined in the Item table or if the return disposition value is not set up to receive returns to the primary location, the system receives the return in the warehouse and location defined for the return disposition value.

Return Disposition User Authority

You can set up authority to a specific return disposition value for a user or user class in the **Work with Return Disposition Values (WRDV)** menu option. Contact Center only displays return disposition codes that the user has authority to. See the Classic View online help for a discussion of setting return disposition authority through Work with Return Disposition Values and the *Return Disposition Authority (A83)* secured feature.

Code: Alphanumeric, 2 positions.

Description: Alphanumeric, 30 positions.

Return Disposition Scenarios

When you select **Return** while creating a misship or return, updates and edits to the *Warehouse* or a *Warehouse Location* vary depending on if the *Return Disposition*:

- **Indicates not to update inventory:** You do not specify a *Warehouse* or a *Warehouse Location*. No inventory transaction takes place when you create the misship or return.
- **Indicates to update the primary location:** The following rules apply when returning a specific item through the *Return Order Line* or the *Create Misship* page:
  - The item's primary location, if any, defaults.
  - **Change to update location other than primary?** If the item does not have a primary location, you can change the return disposition value to one that is set to update a different location, such as a returns location. The warehouse and location code for the returns location then default. If the item exists in additional warehouses and warehouse locations, then they are also available for selection.
  - **Change to not update inventory?** In order to change the return disposition to one that doesn't update inventory, you might need to cancel out of this page and then return, specifying the return disposition before you select **Return**.
- **Indicates to update a specified location, such as a returns location:** The specified warehouse and location defaults. There does not need to be a record of the item in this warehouse and location.

Multiple primary locations? You may see this message when the item you are returning is already assigned a primary location and a different *Warehouse Location* is specified. Depending on the setting of the *Allow Multiple Primary Item Locations (D12)* system control value, you may see a warning, or may be prevented from returning the item to a location other than its primary location.

Returning an order ship-to: When you use the *Return Ship To* page to process a return against all shipped, unreturned units on the order, the warehouse and warehouse location available for selection are based on the return disposition value.

Returning a drop ship item: When you return a *Drop Ship* item, it might not have a primary location or have any existing warehouse location. If the item is actually returning to the vendor for the drop shipment, you should select a return disposition option that does not update inventory.

Return Quantity

The total quantity of all items that you have authorized the customer to return on a return or exchange transaction.

Numeric, 5 positions.

Return Status

The status of a return.

Valid values are:

- **Created** = The return has been created but not yet received.
- **Received** = The return has been received but not yet credited.
- **Credited** = The return has been credited.

Return With Exchange

Select this option at the *Return Order Line* page to process an exchange for an order line return. This option is not available for a retail pickup or delivery order, based on the order's *Broker Delivery Type*.

Return/Exchange Reason

Return Reason

Indicates the reason that the customer is returning an item.

Return reason codes are defined in and validated against the Return Reason table; you can create and work with return reason codes using the **Work with Return Reason Codes (WRTR)** menu option. See **Establishing Return Reason Codes (WRTR)** in the Classic View online help.

Exchange Reason

Indicates the reason that the customer is returning one item and ordering a replacement item.

Exchange reason codes are defined in and validated against the Exchange Reasons table; you can create and work with exchange reason codes using the **Work with Exchange Reason Codes (WEXR)** menu option. See **Establishing Exchange Reason Codes (WEXR)** in the Classic View online help.

Code: Numeric, 3 positions.

Description: Alphanumeric, 30 positions.

Returned (Merchandise Value)

The merchandise amount total of returned items for the current date. Does not include exchanges.

This is the **Invoices credited dollars** in the Order Control Summary table.

Numeric, 20 positions with a 2-place decimal.

Returned (Order Count)

The total number of return transactions processed and credited for the current date, regardless of whether the returns are on the same order. For example, an order with 2 returned order lines processed separately updates this total by 2; however, if the same 2 returned order lines on a single order are processed in the same transaction, the total updates by 1.

Does not include exchanges.

This is the **Invoices credited number** in the Order Control Summary table.

Numeric, 9 positions.

Returned (Unit Count)

The total number of returned units for the current date. Does not include exchanges.

This is the **Quantity credited** in the Order Control Summary table.

Numeric, 9 positions.

Returned Quantity

The total number of units of the item returned or exchanged. This field is updated when the return is received.

A returned quantity does not display for a return created by entering a negative quantity in order entry.

Invoice Returned Quantity

The quantity of the item billed on the invoice that the customer has returned.

Numeric, 5 positions.

Revised Expected Ship Date

The date, if any, sent by the vendor indicating when the merchandise will ship. If the vendor has not revised the **Original expected ship date**, the **Revised expected ship date** field is blank. If the vendor has revised the due date more than once, the most recent date sent is displayed here.

If the vendor revises the expected ship date, Order Administration adds a message to the Activity Table.

If the vendor subsequently removes the revised expected ship date from the PO line, Order Administration replaces the message entry.

> **Note:**
>
> The revised expected ship date on a drop ship purchase order does not update the expected ship date on the order detail line. As a result, the expected ship date shown on the Display Order Detail Screen (Reviewing Order Line Detail) may differ from the revised expected ship date displayed in this field. The **Expected ship date** on the order detail line is updated by backorder card processing only. See Purchase Order Layering and Backorder Notifications.

Numeric, 8 positions, in user date format.

Routing Number

Payment routing number.

Numeric, 9 positions.

S

Sales Representative Name

The sales representative name associated with the sales representative number defined in the **Sales Representative Number** field. This field does not display if a valid sales representative number is not defined in the **Sales Representative Number** field.

Alphanumeric, 30 positions.

Sales Representative

The number assigned to the sales representative associated with the order.

> **Note:**
>
> The **Sales Representative** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Sales Representative Validation

Sales representatives are validated against the Salesman table. You can create and work with sales representatives in the **Work with Sales Representative (WSLS)** menu option. See **Working with Sales Representatives (WSLS)** in the Classic View online help.

Numeric, 7 positions.

Sales Representative Store

List of stores from Work with Store Cross Reference (WSCR). If the Home Store is populated for the Sales Representative (WSLS), default the store if active in WSCR, otherwise defaults to empty.

The **Sales Representative Store** field displays in *Order Entry* and *Order Summary* only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

You must have authority to the *Maintain Originating Store # During Order Maintenance (B23)* secured feature to change the Sales Representative Store in Order Summary - *Edit Additional Order Details* screen.

Search Radius

The search radius used by the *Item Availability (Merchandise Locator)* window to research an item's availability in locations where the customer might be able to pick up the item.

The setting of the *Merchandise Locator Distance Measurement (I39)* system control value (miles or kilometers) defines the unit of measurement for merchandise locator searches.

The search radius defaults from the *Default Search Within Radius (I40)* system control value, unless you changed the radius using the **Edit Item Availability Search Criteria** window.

> **Note:**
>
> - The search radius applies only to locations that use proximity rules. You might set up Order Orchestration so that proximity rules apply to stores only and not warehouses.
> - Typically, a search for a delivery location can use a broader search radius than a search for a pickup location, which is generally within driving distance. To see if the item is available for delivery as opposed to pickup, you might search twice, specifying a different search radius when determining if the item is available for delivery.

Numeric, 5 positions.

Share Information with Other Companies

Defines whether to include the customer's name in lists you sell to other companies for their own catalog mailings. Valid values are:

- **Yes** (selected) = You can sell the customer's name to another company
- **No** (unselected) = Do not sell the customer's name to another company

Ship (Carton) Date

The date when the carton containing one or more units of the item was shipped.

If the shipment has been confirmed delivered, `Delivered` displays to the right of the shipment date.

Numeric, 8 positions (in user date format).

Ship Complete

Indicates whether all items on the order need to be reserved and available for shipping, for example, components for a fitted kitchen. If set to Yes, a ship complete order waits until all items on the order are reserved and available for shipping. This does not mean items will be in the same box, or ship from the same warehouse. It just means when all items on the order are all reserved, picks are generated, and items are now eligible to ship at the same time.

If Ship Complete is not set, items may not be shipped at the same time but shipped when they are available.

When an Order Must be Shipped Complete

The system:

1. Reserves available inventory for the order (reserving a partial quantity for an item whenever possible).
2. Backorders the remaining inventory for the order; the item’s Reserved field is set to 0.
3. Reserves the remaining inventory as it is received on purchase orders; the system ensures that backordered items receive inventory before new orders.

4. Creates pre-generated picks for the order when all items are available; the warehouse can now pick and ship the order.
5. Holds any reserved items until all items can be fulfilled.

When an Order does not have to be Shipped Complete

The system:

1. Reserves available inventory for the order (reserving a partial quantity for an item whenever possible).
2. Creates pre-generated picks for qualifying items; the warehouse can pick and ship these items.
3. Backorders the remaining inventory for the order; the item's Reserved field is set to 0.
4. Reserves the remaining inventory as it is received on purchase orders; the system ensures that backordered lines receive inventory before new orders.
5. Prints pick slips for the remaining items; the warehouse can now pick and ship these items; see Performing Pick Slip Generation.

The system repeats Steps 4-5 for each backordered item until the order has been completely shipped.

Valid values are:

- **Yes** = Order must ship complete; available items will be held until each item is available and the entire order can ship together.
- **No** = Items can be shipped as they become available, or backordered and shipped at a later date.

Defaults to **Yes** if you have the *Default Ship Complete Flag (E09)* system control value selected; otherwise, this field will default to unselected.

For individual items on an order to be shipped together, see Coordinate Group.

Ship Date

The most recent ship date for the item.

If the order line has more than one shipment date because of multiple shipments, the most recent shipment date is displayed. This situation may occur if there was a backordered quantity which you were later able to ship, or because the order line was for more than one unit but the item was flagged as `ship alone`, indicating that each unit of the item must ship separately.

Numeric, 8 positions (in user date format).

Ship-for-Pickup Order

Use the ship-for-pickup integration with Order Orchestration to send the merchandise for an order to a designated store, where the customer can pick it up. The Order Broker integration facilitates communication between Order Administration and the designated store location, so the store receives notification that the order is in transit, and sends notification back to Order Administration after the merchandise is received and when the customer picks up the order.

See the **Order Broker Integration** in the Classic View online help for background.

Ship Together

Also known as a Coordinate Group.

For the entire order to be ship complete, see Ship Complete.

Ship-To Number

The sequential, numeric value the system assigns to each shipping address on an order.

Numeric, 3 positions.

(Ship-To) Status

Indicates the current state of the order ship-to. The ship-to order status is open (i.e., active) unless the status field is set to one of the following values:

- **Held** = An order is held when the system applies some type of hold on the order or a user places an order on hold by assigning a user-defined hold reason code.
- **Open** = An order that is not on hold, closed, canceled, or suspended.
- **Closed** = An order is closed when all the items on the order are shipped or canceled.
- **Canceled** = An order is canceled when you have canceled each item individually or the entire order.
- **Quote** = The order represents a pre-order quote that has not yet been converted to a standard order.
- **Suspended** = An order is suspended while it is being entered into the system. **Note:** You cannot review a suspended order line using the Order Summary page.
- **Express Bill** = The order has been submitted to the background job for billing, but processing is not yet complete.
- **Error** = The order line contains one or more errors.

(Ship-To) Merchandise Total

The total value of the items on the ship-to order, excluding shipping charges, additional charges, service charges, tax (but including hidden tax), handling, and duty. The ship-to merchandise total does not include items that are canceled, soldout, or returned.

Numeric, 13 positions with a 2-place decimal.

Ship Via

The shipper who delivers the merchandise to your customer.

A ship via defined at the order line level takes precedence over the ship via defined for the order. Ship vias are defined in and validated against the Ship Via table. You can create and work with ship vias in the **Work with Ship Via Codes (WVIA)** menu option. See **Working with Ship Via Codes (WVIA)** in the Classic View online help.

If the **Ship via** defined for the item is not the ship via on the order header, you need to specify a valid ship via when adding the item to the order, either through the Add Order Line option or through an exchange.

Express bill? You can use an express bill shipper for orders if, for example, an item has already been taken from the warehouse without first entering an order. An express ship via is designated by a setting of **Express Bill** in the **Billing** code field for the shipper.

Things to note if you specify an express-bill ship via for an order or item:

- **Authorization required:** Authorization for a credit or debit card is required before you can accept the order. If on-line authorization is not enabled, you need to authorize the card manually.
- **Affect inventory?** Orders or lines that you express bill in Contact Center order entry do not affect inventory.

Ship Via Code: Numeric, 2 positions.

Ship Via Description: Alphanumeric, 30 positions.

Ship Via Priority

Field assigned to the ship via that controls how the system allocates inventory to backorders or reserves inventory during Batch Reservation. Valid values range from 0 to 9, where:

1. **0** = Lowest priority
2. **9** = Highest priority

Numeric, 1 position.

Shipped Quantity

The total number of units of the item that have been shipped.

A minus sign indicates a return created by entering a negative quantity in order entry.

Numeric, 5 positions.

Shipped (Merchandise Value)

The merchandise amount total of shipped items, including:

- Shipments confirmed; the system updates the amount total as each unit is confirmed.
- Non-inventory items confirmed during billing.

This total does not include:

- Amounts for returns processed in order entry.
- Amounts on orders that are expressed billed, if the *Order Control Summary Shipment Update Method (I55)* is set to PICKS.
- Amounts for memberships or virtual stored value cards processed at pick slip generation, if the *Order Control Summary Shipment Update Method (I55)* is set to PICKS.

For more information: See the description of the *Order Control Summary Shipment Update Method (I55)* system control value in the Classic View online help for a discussion.

This is the **Orders shipped dollars** in the Order Control Summary table.

Numeric, 13 positions with a 2-place decimal.

Shipped (Order Count)

The total number of shipped orders.

This is the **# Orders shipped** for the current date in the Order Control Summary table. The setting of the *Order Control Summary Shipment Update Method (I55)* system control value determines how the system updates the **# Orders shipped** field in the Order Control Summary table:

- **ORDERS** = The system updates the **# Orders shipped** field when the Billing Async updates the status of an order to closed.
- **INVOICES** = The system updates the **# Orders shipped** field when the Billing Async creates an invoice for an order, excluding credit invoices.
- **PICKS** = The system updates the **# Orders shipped** field when the Billing Async processes a pick control number for an order.

For more information: See the description of the *Order Control Summary Shipment Update Method (I55)* system control value in the Classic View online help for a discussion.

Numeric, 9 positions.

Shipped (Unit Count)

The total number of shipped units for the current date, including:

- Shipped units confirmed; the system updates the units total as each unit is confirmed.
- Non-inventory items confirmed during billing.
- For set items, the system updates the **Quantity shipped** by the number of components, plus the master set item. For example, if shipped master set item A101 includes 2 components, the system updates the **Quantity shipped** by 3.

This total does not include:

- Units for returns processed in order entry.
- Units on orders that are express billed, if the *Order Control Summary Shipment Update Method (I55)* system control value is set to PICKS.
- Memberships or virtual stored value cards processed at pick slip generation if the *Order Control Summary Shipment Update Method (I55)* system control value is set to PICKS.

For more information: See the description of the *Order Control Summary Shipment Update Method (I55)* system control value in the Classic View online help for a discussion.

This is the **Quantity shipped** in the Order Control Summary table.

Numeric, 9 positions.

Shipping Override

A flat freight fee for the order ship to. This fee will be used as the shipping charge on the current order, regardless of any system-calculated freight charges.

If you change the freight override amount and a freight tax override amount exists, the system recalculates the **Freight Tax Override** amount on freight for the order ship to using the tax rate for the freight defined in the **OST Freight Tax Rate** field in the Order Ship To table.

> **Note:**
>
> If a freight override exists, the system does not apply any additional freight, item charges, weight charges, or service charges to the order.

Numeric, 13 positions with a 2-place decimal.

Shipping Refund Amount

The shipping amount to refund for an order ship-to or order line return. You can specify a shipping refund amount only if you select *Refund Shipping* and a freight override was applied to the order. This amount cannot exceed the *Current Shipping Amount*.

Numeric, 13 positions with a 2-place decimal.

Shipping Tax Override

The tax override amount on shipping (freight) for the order ship to. Used only if a shipping override amount is defined.

If defined, the system does not calculate tax on shipping.

- You can define a tax override amount on shipping only on orders received through the Generic Order Interface (Order API) using the **freight_tax_amount** attribute in the Inbound Order XML Message (CWORDERIN).
- If you change the **Shipping override amount** in order maintenance, the system uses the tax rate for the shipping defined in the **OST Freight tax rate** field in the Order Ship To table to recalculate the shipping tax override amount. The system does not update the shipping tax rate based on the updated shipping tax override amount.

The system stores the tax rate for the shipping in the **OST Freight tax rate** field in the Order Ship To table; the system uses the shipping tax rate during return and cancellation processing to determine the amount of tax on shipping that should be returned or deducted during cancellation.

Numeric, 13 positions with a 2-place decimal.

Shipping Tax Rate

The tax rate for the shipping (freight) charges.

The system stores the shipping tax rate in the **OST Freight tax rate** field in the Order Ship To table; the system uses the shipping tax rate during return and cancellation processing to determine the amount of tax on shipping that should be returned or deducted during cancellation.

Numeric, 13 positions with a 2-place decimal.

Shipping

The total shipping, or freight, charge for the order, order line, invoice, or payment.

Shipping charges are based on the freight method defined for the source code used on the order.

This amount does not include any additional shipping charges.

This field is blank if no shipping is charged.

Numeric, 13 positions with a 2-place decimal.

SKU

A unique code used to identify the SKU of an item.

You can create and work with SKU's using the **Work with Items/SKU's (MITM)** menu option. See **Creating and Working with Items** in the Classic View online help.

Alphanumeric, three 4-position fields.

SKU Description

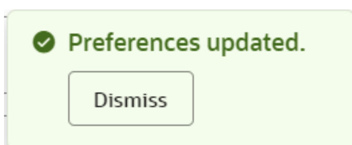
The description of the SKU of the item purchased by the customer. The description displayed is from the SKU description if the *Display SKU Element in Place of SKU Element (F25)* system control value is selected; otherwise, displays the SKU element.

The SKU description is stored in the SKU table. You can create and work with SKU's using the **Work with Items/SKU's (MITM)** menu option.

SKU Description: Alphanumeric, 40 positions.

Snackbar Notification

A message notification box the system displays automatically when you perform an update in the system. For example:



The notification box disappears after the number of seconds indicated at the *Preferences* window, if **Enable Auto-Dismiss** is selected.

Sold-Out Quantity

The number of units of the item that are sold-out.

Numeric, 5 positions.

Soldout (Merchandise Value)

The merchandise amount total of soldout items for the current date.

This is the **Orders soldout dollars** adds in the Order Control Summary table.

Numeric, 20 positions with a 2-place decimal.

Soldout (Order Count)

The total number of soldout orders for the current date, including orders for which all order lines are sold out, or at least one order line is sold out and all other order lines have been canceled using any cancel reason code.

The system considers an order line soldout if you:

- Process soldout order lines in order entry, order maintenance, or the Process Auto Soldout Cancellations (MASO) menu option.
- Cancel all lines on the order with a cancel reason whose **Reduce demand?** flag is selected. However, the system updates only soldout orders and does **not** update soldout units, soldout amounts, canceled orders, canceled units, or canceled amounts for these order lines.

This is the **Orders soldout/closed number** in the Order Control Summary table.

Numeric, 9 positions.

Soldout (Unit Count)

The total number of soldout units for the current date.

This is the **Quantity soldout** in the Order Control Summary table.

Numeric, 9 positions.

Source

A code that identifies a segment of your customer base or a rented list to whom you mail a catalog. The source code helps you to track the origin of the customer's order. The source code typically prints on the catalog mailing label (if your company includes this information when you print labels).

Source codes are stored in the Source Code table. You can create and work with source codes using the **Work with Source Codes (WSRC)** menu option. See **Working with Source Codes (WSRC)** in the Classic View online help.

Each order must include a valid source code during Order Entry, either one that the customer provides (a “known” source code from a catalog mailing) or a generic source code when you cannot trace the origin of the order from a specific catalog (an “unknown” source code).

For Ship For Pickup and Store Pickup Orders with no store code passed in the order, the order is displayed in MV Order Summary with the Ship-To address the same as the Sold-To address. However, these Ship For Pickup and Store Pickup Orders will need to be deleted and re-created as there is not a valid store address passed in them.

The source code controls how shipping is calculated and items are priced, and whether the order is eligible for any discounts.

> **Note:**
>
> The **Source** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Header-Level and Line-Level Source Code

You can define a source code for an order at the order level and item level. A source code is assigned to an order line only if:

- The order entry operator entered a source code at the line level, or
- The *Use Source Code from Order Header When Creating Order Lines (D73)* system control value is selected, or

- The *Load Source from Mailing History (D20)* system control value is selected and the offer entered on the detail line is not associated with the source code on the order header, and the system found an associated source code in the customer's mail history.

The source code at the line level controls demand and sales information/posting for that item, whereas the source code on the order controls how items are priced and freight is calculated.

Defaulting a Source Code to an Order

- The source code may default from the **Current source** field or from mail history for the Sold To Customer depending on the settings of the *Use Default Current Source Code (C46)* and *Load Source from Mailing History (D20)* system control values.
- You can use the *Source Code Auto Retrieval Value (H82)* to automatically retrieve the correct source code based on the most recent mailing to the customer, or to default a source code if the actual code is unknown.
- If you enter a source code at the Select Customer Sold To For Order Screen, the system defaults this source code to the order.
- If the order header source code matches the source code in the *Default Unknown Source Code (I58)* system control value, the system updates the source code on the order header to the source code associated with the offer on the first order detail line.
- You can prompt on the **Source** field in interactive Order Entry to obtain a list of current source codes. Only source codes with a **Y** in the **Display in O/E** field in the Source Code table are listed.

Capturing the Source Code

The system writes the source code used by a new customer to the **Original source** field for the customer.

If the *Update Original Source Code for Recipient Customers (F90)* system control value is selected, the system writes the source code defined for the sold to customer to the **Original source** code field for a recipient customer.

The system may also update the source code to the **Current source code** field for a new or existing customer, depending on the setting of the *Update of Current Source Code in Customer File (D08)* system control value.

Source Code Bypass Credit Checking

If the **Bypass credit check** field for the source code is selected, the system does not perform credit checking for the order and writes a message to order transaction history indicating credit checking was bypassed.

Source Code and Entity History

The system captures entity-level history based on the source code on the order header if the *Track Customer History at Entity Level (F89)* system control value is selected.

Source Code: Alphanumeric, 9 positions.

Source Description: Alphanumeric, 30 positions.

Start Date

The first date when the card is effective. The **Require start date** flag for the pay type controls whether the start date is required or optional. You might use a start date for a debit card to indicate the first date when the card is effective.

Numeric, 4 positions (MM/YY format).

State/Province

The code for the state or province in which the customer receives mail or shipments.

Alphanumeric, 2 positions.

Status

A code identifying the status of a group of records displayed at the *Batch Job Statistics* page.

Store Address

The mailing address for the pickup store.

The store address consists of:

- *Street Address*
- *City*
- *State/Province*
- *Postal Code*
- *Country*

Store Name

The code and name identifying an external store location or warehouse. The store description is displayed in the **Work with Order Broker (WOBR)** menu option as the name of the store assigned to fulfill a brokered backorder, or the description of the warehouse assigned to fulfill a pickup or delivery order or that is shipping a ship-for-pickup order.

Code: Alphanumeric, 10 positions.

Name: Alphanumeric, 40 positions.

Store Pickup Order

Use the store pickup integration with Order Orchestration to send orders to an external retail location where the merchandise is already available for pickup. Unlike a *Ship-for-Pickup Order*, a store pickup order does not require Order Administration to transfer the inventory to the store. The ship-to address on a store pickup order sent from Order Administration to Order Orchestration is the name and address of the originating store location.

See the **Order Broker Integration** in the Classic View online help for background.

Street Address

The customer’s primary delivery address, including address lines 1, 2, 3, and 4.

Alphanumeric, 32 positions each.

Street Address 1

The first line of the customer’s primary delivery address.

Alphanumeric, 32 positions.

Street Address 2-4

Any additional lines of the customer's primary delivery address.

Alphanumeric, 32 positions each.

Suffix

The optional honorific following the customer's name, such as Jr. or Esq.

Not all pages and windows display the customer's suffix. Also, the suffix, is defined, is not displayed if:

- The customer's name has not been defined; that is, the customer is identified by company name only.
- The name is displayed in last name, first name, middle initial format.

The suffix can include special characters.

Alphanumeric, 3 positions.

Suppress Deposit

Indicates whether the system will include this invoice payment method when you run Processing Auto Deposits (SDEP).

Valid values are:

- Selected = The system will not attempt to deposit this payment method.
- Unselected = This payment method will be included when you process deposits.

The system determines how to set this flag based on the setting of the Suppress deposit flag at the Display Order Pay Type Screen (1 of 2). This field can be selected if:

- You create the order through the Generic Order Interface (Order API).
- This is a ship-for-pickup order, and the *Payment at POS for Ship for Pickup Orders (L60)* system control value is selected.

T

Tax

The total sales tax for the order, order line, invoice, or payment, based on the value of the merchandise and, optionally, shipping (freight) and personalization (special handling) charges.

The total in the Tax bucket on the order may not equal the totals for each item if, for example the order is subject to tax on handling and/or freight, or due to rounding up or down to the nearest penny.

If the order is subject to VAT, tax will generally be included in the item prices rather than in the **Tax** field.

This tax amount includes the *GST* and *PST* amounts, if any.

Numeric, 13 positions with a 2-place decimal.

Tax Code

This code determines whether the customer's purchases are taxed, and if so, how to calculate the tax. The tax code defaults to the tax status from the Sold To Customer record for an existing customer, and defaults to unselected for a new customer. When you enter the customer's name and address, the system changes to the tax code to **Standard Tax** if the customer is subject to tax.

> **Note:**
>
> The system ignores the tax code if you use the Vertex interface to calculate tax.

The system uses these values to calculate tax on an order:

- *Tax Included in Price (E70)* system control value and other system control values
- Country table (**Work with Countries (WCTY)** menu option)
- SCF table (**Work with SCF Codes (WSCF)** menu option)
- Postal Code table (**Work with Zip/City/State (Postal Code) Table** (WZIP) menu option)
- Customer Sold To table and Customer Tax table (**Work with Customer Tax Status**)
- Item and SKU tables; Item Tax Exemption table and GST Tax Exemption Status table (**Work with GST Tax Exemption Status (MGTX)** and **Work with Item Tax Exemptions (WITX)** menu options)
- Additional Charge Code table (**Work with Additional Charge Codes (WADC)** menu option)

The information that the system gathers for tax calculation purposes includes tax rates, calculation methods for the Canadian GST and PST taxes, and whether to tax freight and/or handling.

You can set up a tax exemption as a default for a customer, or exemptions in particular states or provinces.

Valid values are:

- **Standard Tax** = Indicates that the customer is subject to all regular taxes. If the customer resides in Canada, the customer is subject to both GST and PST.
- **Non Taxable** = Indicates that the customer's purchases are not taxed.
- **Resale** = Indicates that the customer is a reseller. A reseller is a person or company who purchases goods to sell to someone else. A reseller tax identification number is required. The system will not calculate standard tax or VAT, if applicable, on the order.
- **Exempt** = Indicates that the customer is considered tax-exempt. A tax-exempt identification number is required. The system will not calculate standard tax or VAT, if applicable, on the order.
- **GST Only (Goods and Services Tax)** = Indicates that the customer is a Canadian customer who is subject to the Goods and Services tax (GST) on purchases only.

GST is a federal tax. The *GST Rate (A90)* system control value defines the default GST rate; however, an override GST rate may exist for the postal code or SCF.

- **PST Only (Provincial Services Tax)** = Indicates that the customer is a Canadian customer who is subject to the Provincial Services tax (PST) on purchases only.

Tax Identification

The customer's tax identification code, typically a certificate number that identifies this customer as a reseller or tax-exempt customer who is not charged sales tax. A tax identification code is required if the Tax code is **Resale** or **Exempt**; otherwise, the code does not control taxability for the customer.

The **Tax identification** field in the customer record defaults to the **Tax Identification** field in order entry for each new order placed by an existing customer. A new customer must provide a tax identification code during order entry to avoid paying sales tax.

Note that entering a Tax identification code in Contact Center order entry does not update the customer record with the entered code.

If a customer has a VAT exemption number, the tax code will default to **Exempt** and the words **VAT EXEMPT** will default in the **Tax Identification** field for any order subject to VAT. You cannot override a VAT exemption and make the order taxable.

Alphanumeric, 30 positions.

Total Orders

The gross number of orders placed by this customer.

Total Order Updates

- If the *Update Demand for Order Maintenance Transactions (C72)* system control value is selected, this field increases when you add a detail line(s) to an order in order maintenance.
- If the *Update Demand for Order Maintenance Transactions (C72)* system control value is unselected, this field does not update when you add a detail line(s) to an order in Order Maintenance.

Cancellations and Total Orders

This total reduces when you cancel an order only if you enter a cancel reason set to update demand; otherwise, the orders quantity remains the same and the Cancels quantity total increases.

Returns and Exchanges and Total Orders

The total does not increase when you enter a return through order entry or enter an exchange item on an order that is already open or held.

Numeric, 5 positions.

Tracking Number

The shipping tracking number, as reported through the Generic Pick In API (Shipments, Voids, and Backorders).

Tracking Number Link

If you are using the Narvar integration, the tracking number is a live link enabling you to track the shipment, provided:

- You have completed setup of the related system control values, including the *Narvar Track URL Prefix (M60)*.
- You have specified the **Narvar Carrier Name** and **Narvar Carrier Service Code** for the ship via.
- You specified a tracking number when confirming the shipment.
- All other configuration was completed for Narvar, as described under **Narvar Integration Setup** in the Classic View online help.

> **Note:**
>
> - After you enable Narvar, tracking number links that were created previously do not work automatically when you click on them at this screen.
> - The tracking number link can still be available if all the above requirements are met, even if the customer did not receive a shipment confirmation when, for example, the customer has opted out of email communication.
> - The tracking link is not supported for drop ship purchase orders or shipments made through the Order Broker integration. The tracking link is supported for drop ship picks.

Otherwise, if not using Narvar, the tracking number is a live link if the ship via type is UPS, Federal Express, or Parcel Post (not Parcel Post Class 1, 2, 3, or 4). If the link is live, you can click it to advance to the shipper's web site and review shipment history, provided you have access to the World Wide Web.

Supported ship via types: Live links to shipment tracking web pages for shippers are available if the ship via type is:

- UPS
- Federal Express
- Parcel Post (not Parcel Post Class 1, 2, 3, or 4)

If the ship via type is anything other than UPS, Federal Express, or Parcel Post, the tracking number is not a live link.

Alphanumeric, 30 positions.

U

Unit Price

The price the customer was charged for a single unit of the item, after applying all discounts and repricing.

> **Note:**
>
> If the item was added to the order at no charge, such as a free gift or a component of a set, the **Unit Price** is zero.

Numeric, 13 positions with a 2-place decimal.

Unreturned Quantity

The quantity of an order line that has been shipped and not yet returned or exchanged.

Numeric, 7 positions.

User Hold

Allows you to place an order line on hold.

- **Selected** = The order line is on user hold.
- **Unselected** = The order line is not on user hold.

Only open lines are eligible to be held. The item is not eligible for pick slip preparation until you release the line; if you generate a pick slip for the other items on the order, the pick slip lists this item as backordered.

You can also put order lines in held status automatically through a special handling format.

User Hold Reason

The user-assigned reason why an order is on hold.

Hold reasons are defined in and validated against the Order Hold Reason table. You can create and work with hold reasons in the **Work with Order Hold Reasons (WOHR)** menu option. See **Establishing Order Hold Reason Codes (WOHR)** in the Classic View online help.

When you select this field at the *Edit Additional Order Details* page all hold reasons, including those that the system assigns to orders, are available for selection.

Hold Reason Description: Alphanumeric, 30 positions.

Hold Reason Code: Alphanumeric, 2 positions.

User ID

A valid user ID as defined in the Users table. You can create and work with users in the **Work with Users (WUSR)** menu option. See the Administration Guide for more information on defining users.

User Company Authority

The user record controls access to the companies available in Modern View. When you first advance from *Classic View*, the company that was currently selected in Classic View defaults.

If the user changed company while working in Modern View, the company change is not retained when the user returns to Classic View.

User Language and Date Format

The system looks at the **Locale** and **Date Format** defined for the user in the Users table and the **Locale** and **Date Format** defined for the company in the Company table to determine the language and date format to display in certain areas of the application. See **Regional Settings** in the Classic View help for more information.

Order User ID

The user ID assigned to an order represents the user ID of the person or process that created the order.

Alphanumeric, 10 positions.

User Name

The name of a valid user as defined in the Users table and validated in Oracle Identity Cloud Service (IDCS) or OCI IAM (Oracle Cloud Infrastructure Identity and Access Management). See **User Configuration** in the Administration Guide for background.

Alphanumeric, 30 positions.

User Password

The user's password.

See **Oracle Identity Authentication (IDCS or OCI IAM)** in the Administration Guide for information on setting up a user through IDCS or OCI IAM.

Alphanumeric, length defined by system administrator.

V

Vendor

The number and name of the vendor assigned to fulfill the drop ship item.

Vendors are companies who supply you with merchandise or services. You can create and work with vendors in the **Work with Vendors (WVEN)** menu option. A record must be established on the system for every vendor from whom you purchase merchandise. See **Working with Vendors (WVEN)** in the Classic View online help.

Code: Numeric, 7 positions.

Name: Alphanumeric, 30 positions.

Vendor Response 1

The primary response received from the service bureau.

Authorization Transaction

The code and description for **Vendor response 1** from the Authorization History table.

Authorization Reversal Transaction

This field is blank for an authorization reversal transaction.

Deposit Transaction

The **Response code** from the CC Deposit History table.

Code: Alphanumeric, 10 positions.

Description: Alphanumeric, 40 positions.

Vendor Response 2

The secondary response received from the service bureau.

Authorization Transaction

The code and description of the credit card security response (CID, CVV2, CVC2) for an authorization transaction.

If a card security value and card security presence were not provided for the credit card, this field is blank.

The card security response code is from the **Vendor response 2** in the Authorization History table.

Authorization Reversal Transaction

This field is blank for an authorization reversal transaction.

Deposit Transaction

This field is blank for a deposit transaction.

Code: Alphanumeric, 10 positions.

Description: Alphanumeric, 40 positions.

W

Warehouse

The code and description of a warehouse used to fulfill an order or order line.

The warehouse code defined at the order level overrides all warehouse codes except those defined for an individual order line.

The warehouse code defined at the order line level overrides:

- The warehouse from the order header.
- The warehouse from a warehouse list.
- The warehouse defined for the item in the Item table.

Warehouse codes are defined in and validated against the Warehouse table. You can create and work with warehouses using the **Work with Warehouses (WWHS)** menu option. See **Creating and Maintaining Warehouses (WWHS)** in the Classic View online help.

> **Note:**
>
> The **Warehouse** field displays in Contact Center only if it is selected for display in the **Work with Contact Center (WWCC)** menu option.

Warehouse Defaults

The system uses the following hierarchy to default a warehouse to the order header.

1. Default the **Reserve warehouse** defined for the shipping address on the order.
    - This is the **Reserve warehouse** defined for the permanent ship to customer on the order.
    - If a permanent ship to customer does not exist on the order, this is the **Reserve warehouse** defined for the recipient sold to customer on the order.
    - If a recipient sold to customer does not exist on the order, this is the **Reserve warehouse** defined for the sold to customer on the order.
2. If the *Reserve from Non-Allocatable Warehouse (J25)* system control value is **selected**, default the non-allocatable warehouse defined for the order type on the order. **Note:** If you change the order type on the order, the system defaults the non-allocatable warehouse defined for the new order type. If a non-allocatable warehouse is not defined for the new order type, the system removes the warehouse from the order header.
3. If the *Reserve from Non-Allocatable Warehouse (J25)* system control value is **unselected** or a non-allocatable warehouse is not defined for the order type on the order, leave the **Warehouse** field on the order header blank. **Note:** If you change the order type on the order, the system defaults the non-allocatable warehouse defined for the new order type. If a non-allocatable warehouse is not defined for the new order type, the system retains the warehouse default that currently exists on the order header.

Warehouse Reservation Hierarchy

The system uses the following hierarchy to determine the warehouse where an order will ship from.

1. **Warehouse Defined on Order Line:** If you have defined a warehouse code for an individual order line, the system reserves the item from this warehouse.
2. **Warehouse Defined on Order Header:** If you have defined a warehouse code on the order header, the system reserves the items on the order from this warehouse, unless a different warehouse is defined for an individual order line.
3. **Warehouse List:** If you have not entered a warehouse code for an individual order line or a warehouse code on the order header, the system will look for a warehouse list for the SCF of the order ship to address, if the *Ship Complete from 1 Warehouse (B16)* system control value is **selected**.
4. **Item's Primary Warehouse:** If no reserve warehouse can be assigned based on individual order lines, a warehouse code entered on the order header, or a warehouse list, the system will reserve the item in the warehouse defined for the item in the Item table.

Updating the Warehouse Defined for the Order

If you update the warehouse defined on the order header, the system:

- Removes any existing inventory reservations for the order lines on the order.
- Attempts to reserve the items on the order in the new warehouse specified. If the item is not available in the warehouse specified, the system assigns this warehouse as the backorder warehouse for the unreserved quantity of the item on the order line.

Updating the Warehouse Defined for an Order Line

If you update the warehouse defined for an order line, the system:

- Removes any existing inventory reservations for the order line.
- Attempts to reserve the item on the order line in the new warehouse specified. If the item is not available in the warehouse specified, the system assigns this warehouse as the backorder warehouse for the unreserved quantity of the item on the order line.

Example: You add item A123 to an order for a quantity of 3 and it reserves against warehouse 1. You change the warehouse for the order line from warehouse 1 to warehouse 2. The system unreserves the quantity of 3 from warehouse 1 and reserves the quantity against warehouse 2. However, warehouse 2 can only reserve 2 units of the item; the remaining 1 unit is backordered against warehouse 2.

Reserving Against a Non-Allocatable Warehouse

If the *Reserve from Non-Allocatable Warehouse (J25)* system control value is **selected**, the system lets you to reserve inventory against a non-allocatable warehouse. You can define a non-allocatable warehouse in the **Reserve warehouse** field for the order type; any orders entered for this order type default the non-allocatable warehouse to the **Warehouse** field on the order and reserves against the non-allocatable warehouse. If the item is not in stock, the system backorders the item against the non-allocatable warehouse.

Warehouse Code: Numeric, 3 positions.

Warehouse Name: Alphanumeric, 30 positions.

Warehouse Available

The quantity of the item available to sell in the warehouse. This quantity includes only reservable locations, not locations defined as defective or return to-vendor.

Item availability is calculated as follows:

```
On hand - Protected - Reserved - Reserve Transfer - Backordered =
Quantity available
```

Numeric, 7 positions.

Warehouse Backordered

The quantity of the item/SKU in the warehouse that is currently on open orders but not available in the warehouse.

Numeric, 7 positions.

Warehouse Location

The location in the designated *Warehouse* where an item is returned. The warehouse location is required when a return, exchange, or misship return has a *Return Disposition* indicating to update inventory.

Alphanumeric, 7 positions.

Warehouse Open Purchase Orders

The quantity of the item due for receipt on open purchase orders in the designated warehouse.

This quantity increases when you enter a purchase order and decreases when you receive a purchase order.

If you receive purchase orders into suspense, the suspended quantity remains in this total until you place the suspended stock.

Numeric, 7 positions.

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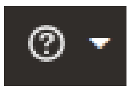
About the Application

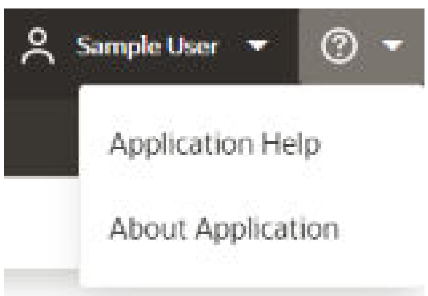
Purpose: Use the **About the Application** window to review information about Order Administration, including Modern View.

How to display:

- Expand the drop down under the online help icon in the upper right:



- Select the **About the Application** option:



In this window: Information on the **About the Application** window includes:

- **Version**: The build number installed on the Order Administration application server. The version displays in `CY.major.service.patch` format, where `CY` is the calendar year, `major` is the major update number per CY, `service` is the quarter and month within quarter, and `patch` is the patch update number, if any. For example: 24.1.101.0
- **Database Level:** The database level used to run the Classic View of Order Administration and the Modern View module. The database level displays in `major.minor.patch` format, where `major` is the major release number, `minor` is the minor release number, and `patch` is the patch release number, or is set to 0 if there is no patch, for example: 24.1.0.
- **Operating System**: The version of the operating system that the application is using.
- **Operating System Architecture**: The processing architecture used to run the Classic View of Order Administration and the Modern View module.
- **Java Version**: The version of Java used to run the Classic View of Order Administration and the Modern View module.
- **Java Vendor**: The vendor that provided the version of Java that runs the Classic View of Order Administration and the Modern View module.
- **Internal Build**: The internal build number assigned to the EAR file used to run the Classic View of Order Administration. The build number displays in

`major.minor.patch.YYMMDDHHMMSS` format, where `major` is the major release number, `minor` is the minor release number, `patch` is the patch release number, and `YYMMDDHHMMSS` is the date and time of the build.

- **Modern View Build:** The build number, JET version, and JRAF version for the Modern View module, formatted as `20240118170418PM - JET 14.1.3 - JRAF 14.1.1`, where 20240118170418PM is the date and time stamp for the version and build.
- **Current Order Volume**: The order count for the current year. You can also run the **Order Volume Report (OVOL)** to generate the Order Count report, which provides the total number of orders entered in Classic View and Contact Center broken out by company, and optionally, order type for a specified date range.

Note:

- Orders entered in a company flagged as inactive do not count towards the current order volume. If a company is flagged as inactive, the Menu Driver Screen displays a message indicating `This company is flagged as inactive and should not be used to process live orders`. You can review the **Active company** setting for a company in the **Work with Companies (WCMP)** menu option.
- The system does not increase the order count for orders received from Order Orchestration whose originating location is Order Administration.
- **Additional Information**: Copyright and legal information provided by Oracle.

For more information:

- *Header Components* for more information on the components of the header that displays at the top of each page.