


Customer Order Management PCA

User Guide

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Preface

This manual explains the various tasks of the Sterling Customer Order Management PCA.

Intended Audience

This manual is intended to provide assistance to customer service representatives who are using the Sterling Supply Chain Applications Call Center Console to capture and access information about orders. This manual is also intended for store users who capture and maintain orders after they are captured by the Sterling Customer Order Management PCA.

Structure

This manual contains the following sections:

Chapter 1, "Using the Sterling Customer Order Management PCA Dialogs and Windows"

This chapter discusses the structure of the Sterling Customer Order Management PCA user interface and the various tasks that you can perform using this application.

Chapter 2, "Tasks for a Customer Service Representative"

This chapter describes tasks that a customer service representative (CSR) may be required to perform frequently.

Section 3, "Tasks for a Store Representative"

This chapter describes tasks that a store user may be required to perform frequently.

Documentation

For more information about the Sterling Customer Order Management PCA[®] components, see the following manuals in the Sterling Customer Order Management PCA[®] documentation set:

- *Sterling Customer Order Management PCA[®] Release Notes*
- *Sterling Customer Order Management PCA[®] Installation Guide*
- *Sterling Customer Order Management PCA[®] Concepts*
- *Sterling Customer Order Management PCA[®] Implementation Guide*
- *Sterling Customer Order Management PCA[®] User Guide*
- *Sterling Customer Order Management PCA[®] Upgrade Guide*
- *Sterling Customer Order Management PCA[®] Javadocs*

For more information about the Sterling Supply Chain Applications[®] components, see the following manuals in the Sterling Supply Chain Applications[®] documentation set:

- *Sterling Supply Chain Applications[®] Release Notes*
- *Sterling Supply Chain Applications[®] Installation Guide*
- *Sterling Supply Chain Applications[®] Upgrade Guide*
- *Sterling Supply Chain Applications[®] Performance Management Guide*
- *Sterling Supply Chain Applications[®] High Availability Guide*
- *Sterling Supply Chain Applications[®] System Management Guide*
- *Sterling Supply Chain Applications[®] Localization Guide*
- *Sterling Supply Chain Applications[®] Customization Guide*
- *Sterling Supply Chain Applications[®] Integration Guide*
- *Sterling Supply Chain Applications[®] Product Concepts*
- *Sterling Warehouse Management System[®] Concepts Guide*
- *Sterling Supply Chain Applications Platform[®] Configuration Guide*

- *Sterling Distributed Order Management® Configuration Guide*
- *Sterling Supply Collaboration® Configuration Guide*
- *Sterling Global Inventory Visibility® Configuration Guide*
- *Sterling Product Management® Configuration Guide*
- *Sterling Logistics Management® Configuration Guide*
- *Sterling Reverse Logistics® Configuration Guide*
- *Sterling Warehouse Management System® Configuration Guide*
- *Sterling Supply Chain Applications Platform® User Guide*
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- *Sterling Warehouse Management System® User Guide*
- *Sterling Supply Chain Mobile Application® User Guide*
- *Sterling Supply Chain Analytics® Guide*
- *Sterling Supply Chain Applications® Javadocs*
- *Sterling Supply Chain Applications® Glossary*
- *Sterling Parcel Carrier Adapter® Guide*
- *Sterling Application Server® Installation Guide* (for optional component)

For a description of the various documents in the Sterling Customer Order Management PCA® documentation set, see the Sterling Customer Order Management PCA® documentation home page at:

<YFS_HOME>/documentation/YCD_doc_home.html

where <YFS_HOME> = <YANTRA_HOME>/Runtime

and <YANTRA_HOME> is the directory where this PCA and the Sterling Supply Chain Applications® are installed.

Conventions

The following conventions may be used in this manual:

Convention	Meaning
. . .	An ellipsis represents information that has been omitted.
< >	Angle brackets indicate user-supplied input.
mono-spaced text	Mono-spaced text indicates a file name, directory path, attribute name, or an inline code example or command.
/ or \	Slashes and backslashes are file separators for Windows, UNIX and LINUX operating systems. The file separator for the Windows operating system is "\" and the file separator for Unix and Linux systems is "/". The Unix convention is used unless otherwise mentioned.
<YANTRA_HOME>	User-supplied location of the Sterling Supply Chain Applications installation directory.
<YFS_HOME>	Location of the generated <YANTRA_HOME>/Runtime directory.

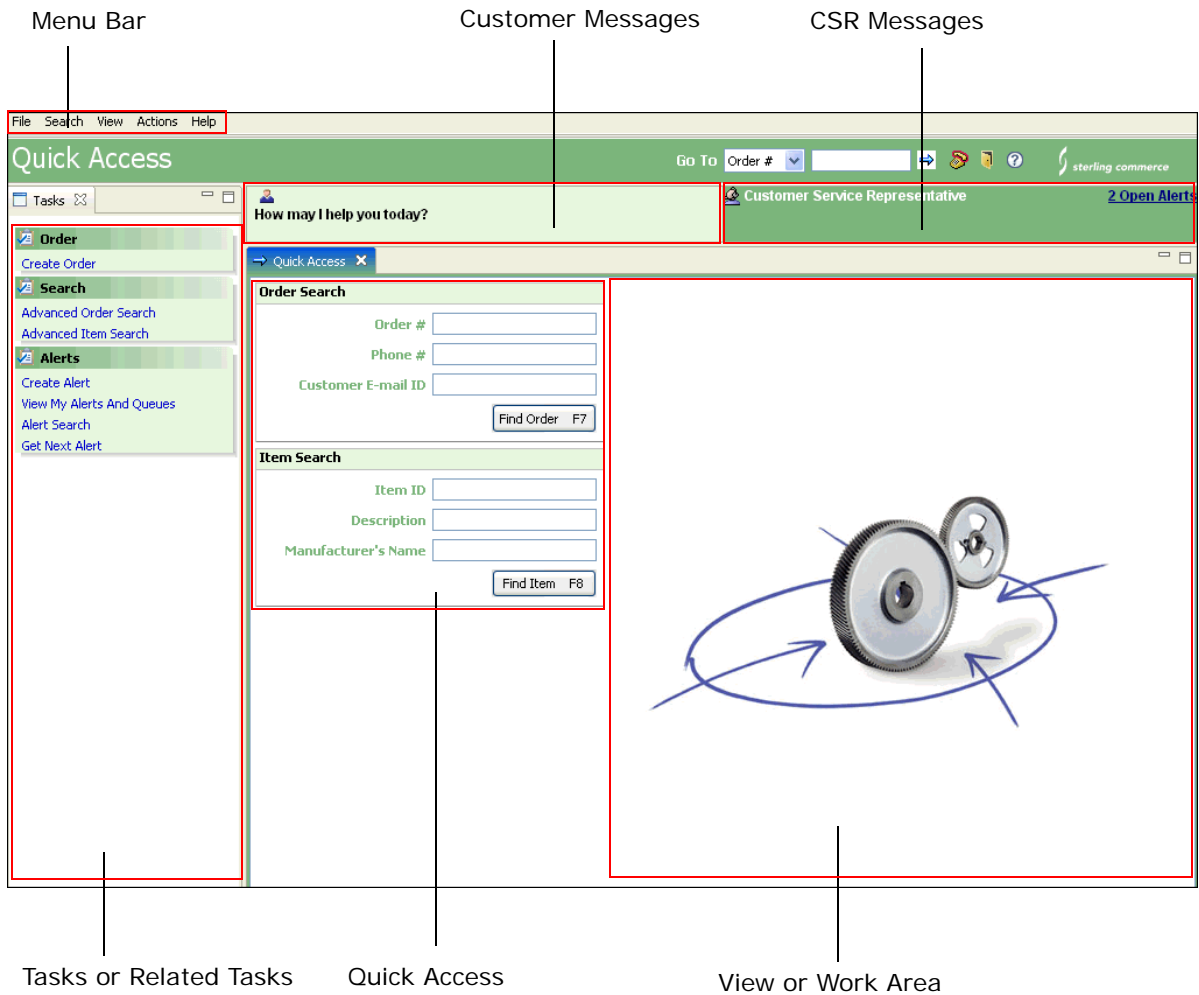
Using the Sterling Customer Order Management PCA Dialogs and Windows

To get the most benefit from the Sterling Customer Order Management PCA, it is important to understand the structure of the Sterling Customer Order Management PCA and how it can best work to meet your business requirements.

This chapter discusses the structure of the Sterling Customer Order Management PCA user interface and the various tasks that you can perform using this application.

[Figure 1–1](#) illustrates the layout of the Sterling Customer Order Management PCA user interface.


Figure 1–1 Sterling Customer Order Management PCA Layout



The Sterling Customer Order Management PCA dialog elements provide:


- **Menu Bar**—This bar contains various menu options or tasks provided in the application. You can select the appropriate task that you want to perform.

- Customer Messages—Each screen in the Sterling Customer Order Management PCA displays appropriate customer messages to assist you in handling customer interaction smoothly. The customer's name displays in the customer message panel. For example, the Quick Access screen has the following customer message:

 **JOHN DOE**
How may I help you with this order?

Note: In case of the store application, this panel displays appropriate messages to store users.

- CSR Messages—Each screen in the Sterling Customer Order Management PCA has some CSR messages associated with it.

 **Tracey**
Select the appropriate task.

The messages on this panel provide feedback about the tasks being performed and the updates that occur in the application. It may also display the current number of open alerts and a notification of newly assigned alerts. For more information about alert notifications, see [Section 2.6.4, "Notifying Users of Assigned Alerts"](#).

Note: In case of the store application, this panel displays the status of the recent action performed for various tasks.

- Tasks/Related Tasks—This panel displays all tasks and the related tasks that you can perform.
- Quick Access—This panel provides visibility to orders, items, and customers.
- View or Work Area—You can perform customer tasks or view the related task details in the work or view area.
- Dialog Buttons—[Table 1–1](#) describes the commonly used dialog buttons.

Table 1–1 Dialog Buttons

Button	Function
Search	Searches for an order, item, or customer.
Close	Closes the current window.
Next	Displays the next screen.
Previous	Displays the previous screen.
Confirm	Confirms the changes and displays the Order Summary screen.
Reset	Clears all data from the screen.

Note: Press Tab to traverse out of a text box in any screen in the Sterling Customer Order Management PCA.

1.1 Utilizing the Keyboard Shortcuts and Hot Keys

The Sterling Customer Order Management PCA provides keyboard shortcuts and hot keys to help you work quickly. Some of these keys are available only during certain processes or operations. To view a list of hot keys and keyboard shortcuts supported by the Sterling Customer Order Management PCA, press Ctrl+Shift+L in any screen.

1.2 Applying Filters on Order Lines

The Sterling Customer Order Management PCA supports filtering of order lines from any screen that displays a list of order lines. In the screen where you can view the order lines for an order, right-click to apply a filter on the order lines.

- If you select the "Filter On" criteria, the filter is applied to the selected item.
- If you select the "Filter" criteria for an order line, the Filter pop-up screen appears. Enter the appropriate filter criteria information in the applicable fields.
- To clear any applied filter, right-click and select Clear.

1.3 Supported Resolutions

The Sterling Customer Order Management PCA supports a resolution of 800 X 600 pixels or 1024 X 768 pixels.

Tasks for a Customer Service Representative

The role of a Customer Service Representative (CSR) is to capture and maintain an order through the Sterling Customer Order Management PCA. The CSR typically deals directly with the customer and takes action on an order in response to a telephone call or an e-mail message. They are often required to investigate alerts that are raised for certain orders that could not be validated, or otherwise need special handling.

For more information regarding general tasks in the Sterling Customer Order Management PCA such as applying filters on order lines or utilizing keyboard shortcuts and function keys, see [Chapter 1, "Using the Sterling Customer Order Management PCA Dialogs and Windows"](#).

A CSR may frequently be:

- [Searching for an Order or Item](#)
- [Answering Frequent Queries](#)
- [Performing Order Tasks](#)
- [Performing Fulfillment Tasks](#)
- [Performing Other Tasks on an Order](#)
- [Performing Alert and Queue Management Tasks](#)

2.1 Searching for an Order or Item

This task assumes that you need to take some action on an existing order or item in the Sterling Customer Order Management PCA. You can communicate a customer's request by means of a telephone call or an

e-mail message. Generally, the customer knows the order number or has more information to help you locate the order or item.

2.1.1 Searching for an Order

If you know the order number, telephone number, or the e-mail address of the customer, use the Quick Access screen to directly navigate to the order.

To search for an order:

1. In the Quick Access screen, enter the complete order number, the telephone number, or the e-mail address of the customer in the Quick Access panel.
2. Click Find Order.
 - If a single order exists for the search criteria you entered, the Order Summary screen displays.
 - If multiple orders exist for the search criteria you entered, the Order Search screen displays. Enter the appropriate information in the Order Search Criteria panel. Click Search. The Order List screen displays. Double-click the appropriate order number. The Order Summary screen displays. For more information about viewing order summary details, see [Section 2.1.3, "Viewing Order Summary"](#).

2.1.1.1 Performing an Advanced Order Search

Using additional options, you can make your searches more precise and get more detailed information about the order number, customer's telephone number, or the customer's e-mail address.

To perform an advanced order search:

1. Do one of the following to open the Advanced Order Search screen:
 - From Tasks > Search, select Advanced Order Search.
 - In the Quick Access panel, enter the appropriate search criteria and click Find Order.
2. Enter the appropriate search criteria and click Search. The search results display in the Order List panel.

If you cannot find the pertinent order number, click Show Search Criteria. You can enter more restrictive search criteria for the selected task.

3. Double-click the appropriate order number. The Order Summary screen displays. For more information about viewing the order summary details, see [Section 2.1.3, "Viewing Order Summary"](#).

2.1.2 Searching for an Item

If you know the identifier of the item or the alternate item identifier, description of the item, or the manufacturer's name of the pertinent item, you can use the Quick Access screen to view the item details and also to search for independent services by entering the appropriate information for a service item.

To search for an item:

1. In the Quick Access screen, enter or scan the complete identifier for the item or the alternate item, partial description of the item, or the complete name of the item manufacturer.
2. Click Find Item.
 - If a single item exists that matches the search criteria, the Item Detail screen displays.
 - If multiple items exist that match the search criteria, the Item List screen displays with a list a product items. To view the item details, select the item and double-click, or in the Preview panel click the Item ID hyperlink. The Item Detail screen displays.

If you are unable to find the pertinent items, click Show Search Criteria to enter more restrictive search criteria.

Note: If the YCD_NO_AVAILABILITY_CHECK_IN_ITEM_INQUIRY rule is set to "Y", the Availability column does not display, and therefore, you cannot check the item availability.

2.1.2.1 Viewing Product Item Details

In the Item Details screen, you can view the details about a product item such as the brief description of the item, price, manufacturer or brand information, and different fulfillment methods that are allowed.

To view the details of a product item:

1. In the Availability panel, select the country name from the drop-down list from where the customer wants to check the availability of the items and enter the city, state, and zip code.
2. Click Get Availability. The total quantity of the item that is available in the zip code displays in the Available Quantity field.

To check the availability of items in other stores, click View Stores. For more information about viewing store inventory, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).

In the Promotions panel, you can view all promotions associated with the item. For more information about promotions, click the hyperlink in the Short Description column.

3. If you want to view more details of the item, click More Details. The More Details Of Selected Item screen displays.
4. If you want to add the item to the order, click Add to Order.

Note: You can configure the country drop-down to ensure that it does not display on the screen. For more information about configuring the country display, see the *Sterling Customer Order Management PCA Implementation Guide*.

2.1.2.2 Viewing the Service Item Details

In the Service Item Details screen, you can view the details of provided services, such as the service description, price, UOM, and the availability of the service item.

To view the details of a service item:

1. In the Availability panel, select the country name from the drop-down list from where the customer wants to check the availability of the service item and enter the city, state, and zip code.
2. Click Check Availability. If the service is available, the message "This location can be serviced" displays. Click the View Calendar hyperlink. You can view the service appointments.
3. In the Promotions panel, you can view all promotions associated with the service item. For more information about promotions, click the hyperlink in the Short Description column.
4. If you want to create an order for the selected item, click Create Order.
5. If you want to add service items to the order, click Add to Order.

2.1.2.3 Viewing More Details of the Selected Product Items

You can view more details of the selected product items.

- To view more information about the item's accessories, click the Accessories tab. You can view the identifier of the item or the alternate item, the item's description, associated quantity, and the unit price of all accessories associated with the item.
- To view the kit details, click the Kit Details tab. You can view the kit components, item's description, and the kit quantity.
- To view the item's specifications, click the Specifications tab.

- To view the items available for upsell, click the Upsell tab. You can view the identifier of the item or the alternate item, the item's description, associated quantity, and the unit price of all items for upsell.
- To view the items available for substitutions, click the Substitutions tab. You can view the identifier of the item or the alternate item, item's description, associated quantity, and the unit price of all items for substitutions.
- To view the service options of an item, click the Service Options tab. You can view the identifier of the service item, item's description, associated quantity, whether the service scheduling must be held until the item is delivered, the service time offset in hours (difference between provided service and product delivery), and the unit price of all the services available for the item.

2.1.2.4 Performing an Advanced Item Search

If you do not know the complete details about a product or a service item such as the identifier of the item or the alternate item, the item's description, or the manufacturer's name, you can perform an advanced item search.

To perform an advanced item search:

1. Do one of the following to open the Item Search screen:
 - From Tasks > Search, select Advanced Item Search.
 - In the Quick Access panel, click Find Item.

In the Item List panel, you can view the item ID, description, available quantity, and the unit price of all items.




2. Select an item in the Item List panel to view more information about the item in the Item Details panel.
 - If you select a product, you can view the identifier of the item, item's description, unit of measure, availability, and unit price.
 - If you select an independent service, you can view the identifier of the item, item's description, unit of measure, and unit price.
3. If you cannot find the items that you are searching for, click Show Criteria to change your search criteria.

4. Choose any one of the following and click Search:
 - Products—Provides a list of items
 - Independent Services—Provides a list of services
5. If you are unable to find the pertinent items, click Show Search Criteria to enter more restrictive search criteria.
6. Double-click on the required item to view the item details.

2.1.3 Viewing Order Summary

A customer may have some queries or may request some changes on an order that is already placed. In such situations, you may want to view the order details before performing any task.

To view the summary of an order:

1. Do one of the following to open the Order Summary screen:
 - From the Quick Access screen, enter the complete order number, the customer's telephone number, or the customer's e-mail address and click Find Order.
 - If you do not enter the complete order number, the Order Search screen displays. Enter the appropriate information in the Order Search Criteria panel. Click Search. The Order List screen displays. Double-click the appropriate order number. The Order Summary screen displays.
2. In the Primary Details panel, you can view the order number, order status, order date, total amount, and the channel through which the order is placed. If the order has any associated alerts, a hyperlink indicating the total number of open alerts displays. To view the alert details, click the hyperlink associated with the  icon. For more information about viewing alerts, see [Section 2.6, "Performing Alert and Queue Management Tasks"](#). If the order or any of the order lines are on hold, the  icon displays against the order status. To view and resolve holds, click the  icon. For more information about resolving order holds, see [Section 2.3.5, "Resolving Holds"](#). The provided service line displays as a service line.
3. In the Bill To Address panel, you can view the details of the customer's address.

4. In the Ship To Address panel, you can view the Ship To address to where the order is sent. If the order has multiple shipping addresses, the message "There are multiple shipping addresses on this order" displays.
5. In the Completed Order Lines panel, you can view the product and/or service order lines that are fulfilled.
6. In the Incomplete Order Lines panel, you can view the product and/or service order lines that are not fulfilled.

You can also view the indicator icons associated with the items, if applicable. Place your cursor on these icons to view their purpose.


Note: When you click the tracking number hyperlink in the Completed Order Lines panel and the Expected On ship date hyperlink in the Incomplete Order Lines panel, the Shipment Inquiry screen displays. For more information about tracking an item, see [Section 2.3.8, "Tracking an Item or Inquiring About a Shipment"](#).

Note: The Expected On ship date in the Incomplete Order Lines panel displays the approximate date for the expected shipment. When you click the Expected On ship date hyperlink, the Shipment Inquiry screen displays. You can view more appropriate dates for the expected shipment, if the fulfillment method is "Shipping" or "Delivery". You can also view the expected date for the shipment in the Change Fulfillment Options screen.

7. In the Important Notes panel, you can view any additional information entered for the order. For more information about viewing or adding notes to an order see, [Section 2.3.4, "Adding Notes to an Order"](#).
8. Right-click on the order line of an item to track the item or view the line summary. For more information about tracking an item, see [Section 2.3.8, "Tracking an Item or Inquiring About a Shipment"](#).

2.1.3.1 Viewing the Order Line Summary

To view the order line summary or provided service line information, from the Order Summary screen, right-click on an order line and select View Line Summary. The Line Summary screen displays. On this screen you can view the following information:

- **Primary Details**—This panel displays the line number, item identifiers, item description, service, status, quantity, and the unit price of an item. The  icon displays if the order line is on hold. It also indicates if the item is an open box and/or a gift item. The other details on the screen displays as follows:
 - If the fulfillment method is Delivery or Shipping, the ship node displays.
 - If the fulfillment method is pickup, the store displays. Click on the store hyperlink. The Store Details window displays. For more information about store details, see [Section 2.1.3.2, "Viewing Store Details"](#).

Note: To display item alias on the Line Summary screen, configure the Item Alias to Use for the Alternate Item ID rule. For more information about configuring rules for alternate item identifiers, see the *Sterling Customer Order Management PCA Implementation Guide*.

- **Shipping Address**—You can view the shipping address for an order line in this panel.
- **Pricing**—You can view the extended price, taxes applied, and the line total. If the item has been price matched, or if the item price has been overridden, you can also view these details in this panel. This panel also displays charge breakup and tax breakup information, if applicable.
- **Important Events**—You can view cancelled, reshipped, or returned information, if any, for the order line. If there are no important events for the order line, the message "No important event occurred on this line" displays.

You can also view the indicator icons associated with items, if applicable. Place your cursor on these icons to view their purpose.

2.1.3.2 Viewing Store Details

The Store Details pop-up screen displays the details about a store such as the store name, store address, and the contact information.

2.2 Answering Frequent Queries

This section contains some of the questions commonly asked by the customers and provides the answers to these questions.

Customers may call you and ask:

- [Where is my shipment?](#)
- [Why was I charged?](#)
- [Why wasn't I refunded?](#)
- [How much will I be refunded?](#)
- [Have you received my returns?](#)
- [Where are my exchange items?](#)

2.2.1 Where is my shipment?

Customers may inquire about the status of their orders. For example, if a customer does not receive items that were ordered, they may call you to inquire about the shipment. For more information about inquiring about a shipment, see [Section 2.3.8, "Tracking an Item or Inquiring About a Shipment"](#).

2.2.2 Why was I charged?

This section provides information to help you answer questions raised by customers regarding charges, refunds, and payment methods.

To inquire about these details for an order, the you must search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

Once you have located the applicable order from Tasks > Frequent Queries, select Why was I charged? The Payment Inquiry screen

displays. You can view the order total and the pending charges for the order.

You can also view the following information:

- **Charges and Refunds**—In this panel, you can view the date and time of the charges applied to the order, charged amount, payment reference, and related invoices.
- Click the hyperlink in this screen to view invoice details. The Invoice Details screen displays. You can view the invoice number, invoice date, the item identifier and description, quantity, unit price, and the line amount. You can also view details such as the sub total, total tax, total discount, total charges, total collected, and the balance amount.
- **Charges Towards Exchange**—If the order has exchange information, you can view the date and time that the charges were applied and the charged amount.
- **Charges From Returns**—If the order has return items, you can view the date and time that the charges for the returned items were applied and the charged amount.

2.2.3 Why wasn't I refunded?

Sometimes customers expect refunds for returned items. If they do not receive a refund, they may call to inquire about the refund. In such situations, you can view the refund details and inform the customer about the reason why they were not issued a refund for the returned items. For more information about inquiring about refunds for returned items, see [Section 2.5.7, "Inquiring About Returns and Exchanges"](#).

2.2.4 How much will I be refunded?

Customers may inquire about the refund amount for the returned items. You can view the refund details for the returned items and inform the customer about the amount that will be refunded for the returned items. For more information about refund inquiries see, [Section 2.5.7, "Inquiring About Returns and Exchanges"](#).

2.2.5 Have you received my returns?

Customers may inquire about whether or not you have received the items that they return. In such situations, you can determine the status

of the returned items and inform the customer. For more information about return inquiries, see [Section 2.5.7, "Inquiring About Returns and Exchanges"](#).

2.2.6 Where are my exchange items?

Customers may inquire about the current status of the items shipped in exchange for returned items. In such situations, you can determine the items that are replacements and view the status of the exchange items. For more information about exchange inquiries, see [Section 2.5.7, "Inquiring About Returns and Exchanges"](#).

2.3 Performing Order Tasks

You may perform several tasks on an order that is placed by a customer. Some of the general tasks that you may perform on an order are:

- [Creating an Order](#)
- [Adding Order Lines](#)
- [Increasing Order Line Quantity](#)
- [Adding Notes to an Order](#)
- [Resolving Holds](#)
- [Canceling an Order](#)
- [Initiating a Return](#)
- [Tracking an Item or Inquiring About a Shipment](#)

2.3.1 Creating an Order

You can identify a customer and create an order for that customer. You can enter multiple order lines for an order, modify fulfillment options and appointments, and confirm the payment information as requested by the customer.

A navigation bar displays at the bottom of all screens in the create order task flow. This helps you to clearly understand the sequence of steps you need to perform to complete the entire task. The navigation bar also helps you to revisit previous screens easily, if applicable.

To create an order:

1. From Navigator > Order, select Create Order or from Tasks > Order, select Create Order. The Select Enterprise pop-up window displays. Select the appropriate enterprise from the drop-down list.
2. Click Confirm. The Create Order: Customer Identification-Shipping Address screen displays.
3. In the Find Existing Customer panel, do any of the following to search for the customer information:
 - Enter the daytime telephone information.
 - Enter the e-mail address of the customer.
 - Enter the last name and first name of the customer.
 - Enter the last name and first few numbers of the postal code of the customer.
 - Enter the first name and first few numbers of the postal code of the customer.
4. Click Search.
 - If more than one customer is found as a result of your search, a list of customer information displays. Select the appropriate customer information from the list.
 - If customers are not found as a result of your search, the following message displays: "Your search found zero results".
 - If more than fifteen customers are found as a result of your search, the following message displays: "Your search resulted in more than 15 matches. Please refine your search criteria". In such situations, you need to enter more restrictive search information.
5. Click Skip this Page if:
 - The customer intends to pick up the items at the store immediately.
 - You want to capture the customer information only after confirming the inventory availability.


Note: Based on how the Sterling Customer Order Management PCA is configured, you may be able to search for customers based on their type.



6. In the Customer Ship To panel, you can modify the Primary Info, Street Address, and Contact Information of the customers, if applicable.
7. If the Bill To Address of the customer is same as the Ship To Address, check the "Use As Bill To Address" box.
 - If you want to override address verification, check the Override Address Verification box.
 - If you do not want to override address verification and the address verification fails, the message "This is not a valid Address" displays.
8. Click Next.


If the Bill-To address is not the same as Ship-To address, the Customer Bill-To screen displays. Enter the appropriate Bill-To information. The Create Order: Add Items screen displays.

Note: If the customer information is not captured initially, the zip code displays as a panel on top of the screen. This enables you to enter the zip code and check for the item availability.

Note: If the Bill-To Address of the customer is the same as the Ship-To Address, and if you have not checked the "Use As Bill To Address" box in the Customer Ship To panel, you can check this box in the Customer Bill To Address screen.

9. To search for an item, in the Item column, click the  icon. The Advanced Item Search screen displays. You can add the item to the order in one of the following ways:
 - Scan the barcode of the item or the alternate item.

- In Item ID, enter the identifier of the item or scan the alternate item identifier.
 - If you have already added an item to the order, click the item name hyperlink. The Item Details screen displays. For more information about viewing the item details, see [Section 2.1.2, "Searching for an Item"](#).
10. To add related product or service items to an order:
- a. Click the  icon. The Related Items pop-up window displays.
 - b. Check the boxes of the product or service items that you want to add to the order.
 - c. Click Add to Order. The related items that you added are indicated by the  icon. The tool tip for the related item indicator displays the parent item description.

Note: The  icon displays next to the items that have related product or service items.

You can view the related items at the bottom of the screen if your user interface is configured to do so.

11. In the Quantity column, enter the required item quantity.
12. In the UOM column, select the UOM for the item from the drop-down list. If a UOM does not exist for an item or if only one UOM exists, this column is not editable.
13. In the Unit Price column, you can view the unit price and list price of the item. The prices shown are according to the Ordering UOM.
14. To override the price of an item, click the Override Price hyperlink. The Override Price for Item screen displays. To override the item price:
 - a. In Overridden Price, enter the new price of the item.
 - b. From the Reasons for Override drop-down list, select the appropriate reason.
 - c. In the Notes panel, enter any additional information, if applicable.
 - d. Click Close.




15. In the Fulfillment Method column, choose the appropriate fulfillment method. If the selected fulfillment method is not available, the message "Not Available" along with the ⚠ icon displays. The Pickup, Ship, and Delivery buttons are enabled, and the item availability date displays next to these buttons. The availability date for:

- Pickup—displays the earliest date on which you can pickup the product from a store.
- Ship—displays the earliest date on which you can ship the item.
- Delivery—displays the earliest date on which the product is available.

Note: In case of the Delivery fulfillment method, the item availability date does not indicate the delivery appointment. It only indicates the date on which the product is available. You must take a delivery appointment at a later point.

The availability details do not display if the user interface is not configured to do so.

- If you want the item to be shipped to the customer, choose Ship.
- If you want the item to be delivered to the customer's doorstep, choose Delivery.
- If the customer wants to pick up the item from the current store, choose Pickup.
- If the customer wants to pick up the item from an alternate store, click the Choose Stores hyperlink. The More Stores screen displays. Select the appropriate store from where you want to pick up the item. The selected store displays next to the Pickup option. For more information about viewing inventory in other stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
- If the order line has already been created for pickup from a store other than the one in which the order is created, and if you want to pick up the item from the same store, choose Pickup from (Store Name).

- If the order line is a service line, the information indicating whether or not you can perform the service for that line displays.
16. In the Line Total column, you can view the order line total.
 17. If the item has accessories, the Accessories panel displays where you can view details about the accessories. To add the accessories to the order, click Add To Order. The Accessories panel displays only when the order line is selected.
 18. To add more lines to the order, click the Add More Lines hyperlink.
 19. To add new service lines, click the Add Independent Services hyperlink. The Item Search screen displays. Select the service you want to add. The service line is added and indicated by the  icon. For more information about performing an advanced item search, see [Section 2.1.2.4, "Performing an Advanced Item Search"](#)
 20. To add an open box item, click the Add Open Box Item hyperlink. For more information about open box items, see [Section 3.3.7, "Adding Open Box Items"](#).
 21. To delete a particular order line, click the  icon associated with the order line. If the order line has related lines associated with it, the related lines are automatically selected for deletion displaying a warning message.
 22. To add order line notes, click the  icon associated with the order line. For more information about adding order line notes, see [Section 2.3.4.1, "Adding Notes to an Order Line"](#).
 23. Click Next. The Create Order: Choose Fulfillment Method screen displays. For more information about choosing a fulfillment method, selecting an appointment, and viewing payment information, see [Section 2.4.1, "Modifying Fulfillment Options"](#).
 24. Click Next. The Fulfillment Summary screen displays. For more information about the fulfillment summary details, see [Section 2.4.2, "Fulfillment Summary"](#).

Note: The Fulfillment Summary screen displays only if the fulfillment method is either Shipping or Pickup.

Note: If you have not captured the customer information, the Billing Address screen displays for you to enter the billing details.

25. Click Next. The Payment Confirmation screen displays.
- If you are not required to enter the payment information, the Order Confirmation screen displays.

Create Order : Summary

starting commerce

Tasks

Search

Advanced Order Search

Advanced Item Search

Store #: XYZ_S1 | xyzs1csr (XYZ S1 CSR)
Your order has been created.

The fulfillment options have been saved on the order.

Quick Access

Advanced Order Search

Draft Order Y100000084

Order Confirmation

Item	Unit Price	Quantity	Fulfillment Me...	Expected On
Installation for TV0001ASF21(PST...	\$0.00	1.00 Hour		
34" LCD TV(TV0001ASF21)	\$0.00	1.00 Each	Pickup	

Print and Close Alt+Shift+P

View/Add Notes Alt+Ctrl+N

Contact Method

Contact Details

☐ Mark Priority as High

John Doe requested to create an order.

Previous F3

Customer Identification

Add Items

Choose Fulfillment

Fulfillment Summary

Save and Close F8

Close Esc

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Note: The Order Confirmation screen displays only if you are not required to enter the payment information or if the payment methods are implemented using an external payment system. For field value descriptions, see [Table 2–1, "Order Confirmation Screen"](#).

Table 2–1 Order Confirmation Screen

Field	Description
Print and Close	Click this button to save notes added to the order, print the order information, and close the order tab.
Cancel Order	Click this button to cancel the order.

For more information about configuring the payment options, see the *Sterling Customer Order Management PCA Implementation Guide*.

26. To view or modify the payment details for an order:
 - a. Click the View/Edit Order Payment Details hyperlink. The Order Payment Details screen displays. Modify the charge details at the order level or order line level.

Note: You can modify only the existing charges.

- b. Select the Charge Override Reason.
 - c. In the Notes panel, enter any additional information, if applicable. For more information about adding notes to an order, see [Section 2.3.4, "Adding Notes to an Order"](#).
 - d. Click Confirm to save the changes and return to the Payment Confirmation screen.
27. Click Confirm.



2.3.2 Adding Order Lines


After placing an order, the customer may want to order more of an item or order for a new item. In such situations, you may need to add new product or service lines to existing orders.

Note: The user can configure the country drop-down menu to not appear on screen. For more information on how to configure the country display, see the *Sterling Customer Order Management PCA Implementation Guide*.

To add new product or service lines, you must first search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

To add new product or service lines:

1. From Tasks > Order, select Add Lines To Order. The Add Multiple Lines: Add Items screen displays.
2. For new order lines, in Item, enter the identifier of the item or item description, or choose the  to select an item from the Item List. You can also click the Add More Lines hyperlink. For more information about performing an advanced item search, see [Section 2.1.2.4, "Performing an Advanced Item Search"](#).
3. For new service lines, click the Add Independent Services hyperlink. The Item Search screen displays. Select the service you want to add. The service line is added and indicated by the  icon. For more information about performing an advanced item search, see [Section 2.1.2.4, "Performing an Advanced Item Search"](#).

Note: When a new line is added to the order, the order line is indicated by the  icon.

4. Click Next. The Add Multiple Line: Choose Fulfillment Options screen displays. You can view a detailed description about the item, quantity, and the fulfillment method.

Note: When you add a related line to the order, the fulfillment method for the related line will default to the same fulfillment method as the parent item. For example, if the fulfillment method of the parent item is "Pickup", when you add a related line, the fulfillment method for the related line is also "Pickup". If the related line does not support this fulfillment method, a warning message displays prompting you to select a different fulfillment method.

Note: The displayable attributes depend on pre-defined configurations. The UOM, Unit Price, Quantity, and the Line Total fields are displayed or hidden based on the display configuration.

5. Choose the appropriate fulfillment option from the Select Fulfillment Method panel.
 - If the fulfillment method is Ship, select the following from the drop-down list:
 - The shipping address
 - The level of service
 - If the fulfillment method is Delivery, select the address to which the product needs to be delivered from the drop-down list.
 - If the fulfillment method is Pickup, select the country from the drop-down list and enter the zip code. Click the Choose Stores hyperlink.
 - If the order line is a service line, the Select Service Address panel displays.
 - Select an address and click the Edit Address hyperlink to modify the address and click Apply.
 - Click the New Address hyperlink to enter a new address and click Apply.

For more information about adding new addresses or modifying the existing address, see [Section 2.3.2.3, "Adding or Modifying Addresses"](#).

Note: If the item does not support the selected fulfillment method, the fulfillment option will be disabled when you select that item. If you select multiple items and they do not share a common fulfillment option, an error displays indicating that there are no common fulfillment methods for selected order lines.

Note: Based on the rules configured, you can modify any order line that has the Delivery fulfillment method until the delivery line is shipped. For more information about configuring special order modification rules, see the *Sterling Customer Order Management PCA Implementation Guide*.

6. Click Next.

Note: If you had skipped the customer identification step and not yet entered the address for lines being shipped or delivered, the address column is highlighted in red and an error message displays indicating that the order line does not have the complete fulfillment information.

- The Add Multiple Lines: Fulfillment Summary screen displays where you can view and modify the configuration of the order and how it is being fulfilled. For more information about fulfillment summary details, see [Section 2.4.2, "Fulfillment Summary"](#).

Note: The Fulfillment Summary screen displays only if the fulfillment method is either shipping or pickup.

- If you have to take an appointment, the Select an Appointment screen displays. For more information about changing service instructions, see [Section 2.4.3, "Modifying Service Instructions"](#).
- 7. Click Next. The Changing Payment Methods screen displays. For more information about modifying payment methods, see [Section 2.5.5, "Changing Payment Methods"](#).

2.3.2.1 Overriding Item Price

You can override the item price of an item in the Override Price for Item screen.

To override the price of an item:

1. From the Unit Price column, select the Override Price hyperlink. The Override Price for Item screen displays.
2. In Overridden price, enter the new price of the item.
3. From the Reasons for Override drop-down list, select the appropriate reason.
4. In the Notes panel, enter any additional information, if applicable.
5. Click Close.

2.3.2.2 Viewing Inventory in Other Stores

If the customer wants to pick up an item from a store that is not displayed on a screen, the CSR needs to look for other stores. To search for other available stores:

1. Click the View More Stores link. The View More Stores screen displays.
1. Enter the zip code from where the customer wants to pick the item.
2. Click Search. A list of stores displays for the zip code.
3. Select the appropriate store from the list.

Note: To select a store using the keyboard, navigate through the list of stores using the Tab key. Once the focus is on the checkbox of the store that you want to select, press spacebar.

Note: If you are dealing with a single country, the country drop-down list does not display on the screen. For more information about configuring the country display, see the *Sterling Customer Order Management PCA Implementation Guide*.

2.3.2.3 Adding or Modifying Addresses

After a customer places an order, the customer may want to add a new address or modify the existing address to deliver the items.

2.3.2.3.1 Adding a New Address

Adding a new address is a common CSR task.

To add a new address:

1. From the appropriate screen, click the New Address hyperlink. The Add Address screen displays. You can view the Primary Info, Street Address, and the Contact Info panels.
2. Enter the applicable information in these panels.
If the address is not valid, the message "This is not a valid address" displays.
3. If you want to override the address verification, check the Override Address Verification box.
4. Click Confirm.

2.3.2.3.2 Modifying an Address

Modifying an existing address is a common CSR task.

To modify an address:

1. From the appropriate screen, select the address you want to modify from the drop-down list and click the Edit Address hyperlink.
If there are multiple shipping addresses with the same information in the first line, the Choose Your Address screen displays. Select the appropriate address.
2. To modify an existing shipping address, click the Modify Address hyperlink in the appropriate Ship-To Address panel. The Edit Address screen displays.
3. Modify the applicable address information.
If the address is not valid, the message "This is not a valid address" displays.
4. If you want to override the address verification, check the Override Address Verification box.
5. Click Confirm.

2.3.3 Increasing Order Line Quantity

Sometimes a customer may want to increase the quantity of one or more items on an order that is already placed. In such situations, the user can increase the order line quantity as requested by the customer. The line quantity can be increased for orders that have single or multiple order lines. For more information about increasing an order line quantity, see [Section 3.3.8, "Increasing Order Line Quantity"](#).

2.3.4 Adding Notes to an Order

You may need to enter some additional notes on an order describing the various actions taken on that order for future reference. The order notes can be either entered manually or automatically generated by the system. To add notes to an order you must search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

To add notes to an order:

1. From the Order Summary page, click the View/Add Notes hyperlink in the Important Notes panel. The Order Notes screen displays.

Note: The Important Notes panel displays only the high priority notes.

2. To view notes for a specific note type, select a note type from the Filter By Note Type drop-down list.
3. Check the Exclude System Generated Notes box to view only notes that are manually entered.
4. To view notes for a specific contact method, select the contact method from the Filter by Contact Method drop-down list. For example, to view notes related to a customer's call, you can select Phone as the contact method.
5. To enter notes, select the note type from the Note Type drop-down list.
6. Select the contact method from the Contact Method drop-down list.
7. If the note to be entered assumes high priority, check the Mark Priority as High box.

8. Enter the Contact Details such as the e-mail address or the customer's telephone number.
9. Choose the appropriate emoticon (smiley) for an order note, if applicable.
10. Enter the note text for the order in the space provided.
11. Click Add Note. The note is added and displayed in the Order Notes panel.
12. Click Close.


Note: Whenever you add a new note, the system clears the currently applied filter, if any.

2.3.4.1 Adding Notes to an Order Line

The Sterling Customer Order Management PCA enables you to add order line notes order capture.

To add notes to an order line:

1. From the Order Summary screen, right-click on the appropriate order line and select Add Notes. The Order Line Notes screen displays where you can add appropriate notes.

In the Order Summary screen, the order lines that contain notes are associated with the  icon.

2.3.5 Resolving Holds


When performing order modifications, the entire order or just certain order lines may be placed on hold to prevent further modifications. You can resolve holds if you belong to the user group that has permission to do so. To resolve a hold on an order, you must first search for the orders that are on hold. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

To resolve a hold on an order or order line:

1. From Tasks > Order, select View/Remove Holds. The Order Holds screen displays.
2. Check the appropriate box next to the hold that you want to resolve.

Note: If you want to remove a particular hold, you must belong to the user group that has permission to manually resolve the hold.

3. Check the Check All box if you want to resolve all holds on the order at one time.
4. In the Notes panel, enter any additional information, if applicable. For more information about adding notes, see [Section 2.3.4, "Adding Notes to an Order"](#).
5. Click Confirm.

Note: Click the  icon on the Line Summary screen to view the order line holds only.

2.3.6 Canceling an Order

A customer may want to cancel an entire order, or just certain product or service items of the order. To cancel an order, you must first search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

To cancel an order:

1. From Tasks > Order, select Cancel Order. The Cancel Order screen displays.
2. To cancel the entire order:
 - a. In the Quantity To Cancel panel, select the cancellation reason from the Reason Code drop-down list.
 - b. Choose the Select All Available Quantity For Cancellation option.
3. To cancel only some of the items included in the order:
 - a. In the Quantity To Cancel panel, select the cancellation reason from the Reason Code drop-down list.
 - b. Choose the Select Specific Quantity For Cancellation option.
 - c. Check the boxes of the items you want to cancel.

- d. In the Enter the Quantity to Cancel field, enter the quantity of the item you want to cancel.

Note: You cannot cancel order lines that are greyed out.

4. In the Notes panel, enter any additional information for an order, if applicable. For more information about adding notes, see [Section 2.3.4, "Adding Notes to an Order"](#).
5. Click Confirm. The Confirm Payment screen displays. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).

Note: If the line that you want to cancel has related lines, the related lines are automatically selected for cancellation.

2.3.6.1 Viewing and Confirming the Payment Details

You can view payment details such as the amount reduced, original total, new total, and details about the existing payment methods for the order. You can also add a coupon or new payment method, if necessary. After you view the details or add a coupon or new payment method, click Confirm.

- In the Detail List of Adjustment panel, you can view the item information such as the identifier of the item or the alternate item, the item's description, adjusted quantity, adjusted amount, charge refund details, and applied coupon or promotion details.
- If you want to add a coupon or promotion to the order, click Add Coupon. For more information about adding coupons and promotion codes, see [Section 2.5.4, "Adding a Coupon or Promotion Code"](#).
- If you want to add a new payment method, click Add Payment Method. For more information about adding new payment methods, see [Section 2.5.5.1, "Adding New Payment Methods"](#).
- If you want to enter any additional information for the order, in the Notes panel, enter the appropriate notes. For more information about adding notes, see [Section 2.3.4, "Adding Notes to an Order"](#).

Note:


- If the payment method type is Customer Account, you can modify the MaxChargeLimit.
 - If the payment method type is Other, you cannot modify the MaxChargeLimit. The MaxCharge amount is deducted from the Provide Method of Payment for Amount field.
 - If the payment method type is Check or Refund Check, you cannot modify the check amount. The Check Amount is deducted from the Provide Method of Payment for Amount field.
 - If you want to clear the value in the Amount to Charge field, ensure you enter zero. Do not keep the field blank.
-

2.3.7 Initiating a Return

Customers may want to return or exchange the ordered items. In such situations, you can perform the Initiate Return task for those items that are in the shipped, delivered, or pickup status. To initiate a return, you must first search for the returned order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

To initiate a return:

1. From Tasks > Order, select Initiate Return. The Initiate Return: Quantity Selection screen displays.
2. If the customer wants to return the entire order, choose Select All Available Quantity For Return.
3. If the customer wants to return only a few items on the order, choose Select Specific Quantity For Return.
 - a. Check the boxes corresponding to the items the customer wants to return.
 - b. In the Enter Quantity to Return field, enter the quantity of the item that the customer wants to return.

4. If any of the order lines have reship lines associated with them, the Show Reship Items box displays.
5. If you want to view both original and reship order lines, check the Show Reship Items box. You can view a  icon against the reship order lines.

Note: If the customer wants to return any reshipped items, they must have received both the original and the reshipped items.

6. Click Next. The Initiate Return: Reason Selection screen displays.
7. Select the items that the customer wants to return.
8. Select the appropriate reason for returning the item from the Return Reason drop-down list.

If the same return reason applies to all items in the order, click Apply to all Items.

Note: If you cannot return the items due to some return policy constraint, the Override Return Policy checkbox displays. Check this box to override the return policy.

9. If the customer wants to exchange some or all of the returned items, check the Exchange Returned Item box.
10. Click Next.
 - If the customer wants to exchange some or all of the returned items, the Initiate Return: Create Exchange screen displays.
 - In the Exchange Type panel, choose one of the following exchange types:

Regular—Indicates that the exchanged items are shipped after receiving the returned items.

Advanced—Indicates that the exchanged items are shipped immediately.

Pre-paid—Indicates that the charges are applied for exchanged items and shipped immediately. The refund for the returned items is made after receiving them.

- Select the items for exchange and enter the item quantity.
- To add new items to exchange, in the Add New Item panel, enter the item ID. Click Add New Item. For more information about adding an item, see [Section 2.3.2, "Adding Order Lines"](#).
- To remove an item from an exchange, click the Remove hyperlink associated with the item.
- If the customer does not request an exchange, the Initiate Return: Return Method screen displays.
 - If all items need to be picked up from the customer's location, choose "All Items can be picked up from your location".
 - If different return methods are required for the items, choose "Select different return method(s)" below.
 - From the list, select the items the customer wants to return.
 - In the Select Return Method panel, choose the appropriate return method:

Schedule Pickup—Choose this return method if the customer wants to pick up the item from the customers location.

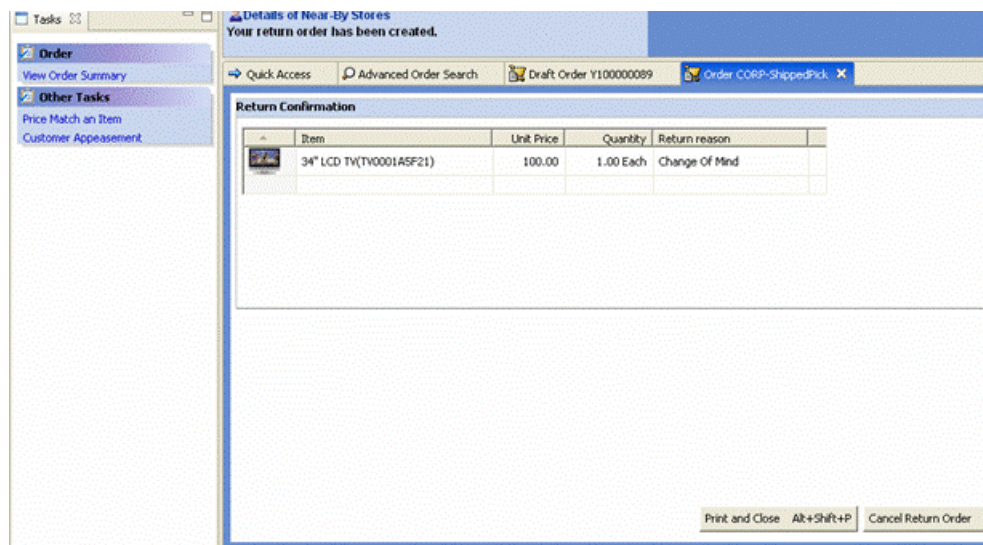
Return To Store—Choose this return method if the customer wants to return the item to a store. Click the Nearby Stores hyperlink. The Details of the Nearby Stores screen displays. Enter the zip code where the customer wants to return the items. Click Search. Select the appropriate store.

Ship To Return Center—Choose this return method if the customer wants to ship the item to any of the return centers.

Credit Without Receipt—Choose this return method to refund the customer for the item. However, the customer will not return the item.

11. Click Next. If any of the items need to be delivered, the Change Service Instructions screen displays. For more information about changing service instructions, see [Section 2.4.3, "Modifying Service](#)

[Instructions](#)". Otherwise, the Initiate Return: Payment Details screen displays. If you are not required to enter payment information, the following return payment confirmation screen displays:



This screen displays only if payment methods are implemented using an external or third-party payment system. For field value descriptions, see [Table 2–2, "Return Order Without Exchange Order Slip Confirmation Screen"](#).

Table 2–2 Return Order Without Exchange Order Slip Confirmation Screen

Field	Description
Print and Close	Choose this button to save any notes on the order, print the order, and then close the order tab.
Cancel Order	Choose this button to cancel the order.

For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).

2.3.8 Tracking an Item or Inquiring About a Shipment

Customers may sometimes need to know the status of their orders. For example, if a customer does not receive items that were ordered, they may inquire about the status of a product or service item. To inquire about the status of a product or service item, you must first search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).


To track an item:

1. Do one of the following to open the Shipment Inquiry screen:
 - From Tasks > Frequent Queries, select Where is my shipment?
 - From Tasks > Order, select Track An Item.
 - In the Order Summary screen, right-click on the required item and select Track This Item.

You can view tracking information for each item. You can also view information about holds applied to an order and hyperlinks to navigate to the alert details screen, if applicable.

2. Select the item for which you want to view the shipment status.
 - If the item is in the "Shipped" status:
 - You can view the date on which the item is shipped.
 - If the item is packed in a container, you can view the tracking number, if available.
 - If the item is packed in multiple containers, you can view the container details.
 - You can view the carrier and service information for the shipment.
 - If you want to reship a container, click the Reship Container hyperlink. The Reship Select Item screen displays.
For more information about reshipping, see [Section 2.4.6, "Reshipping An Item"](#).
 - If you want to view the shipment details, click the View Shipment hyperlink. The Shipment Details screen displays. For more information about viewing shipment details, see [Section 2.3.8.1, "Viewing Shipment Details"](#).

Note: If the capability for tracking a container is provided, the tracking number displays as a hyperlink. Click this hyperlink. The appropriate carrier's website displays where you can view the container's tracking information.

- If the item is not in the "Shipped" status:
 - You can view the date on which the item is scheduled to be shipped, and the estimated delivery date.
 - If the item is packed in multiple containers, you can view the container details.
 - If the shipment is created, but the items are not packed into the containers, you can view the shipment lines.
 - If the order line is on hold, it is indicated by the  icon with "This Line is on Hold" message.
 - If the shipment is not created, but inventory is available, the estimated ship date and the estimated delivery date displays.
- If the item is in the "Delivered" status:
 - You can view the delivery date or estimated delivery date for the shipment.
 - If the item is packed in multiple containers, you can view the container details.
- If the item is a service item, you can view the appointment date and status of the existing service appointment.
- If the customer has picked the item up at a store, you can view the date on which the item was picked up.
- If the item is in the "Cancelled" status, an appropriate message displays. The cancelled item quantity and the date on which the item was cancelled also display.
- If an order line is associated with a work order and service appointments exist for the work order, you can view the service appointments. If there are multiple appointments for a work order, the system displays the most recent service appointment.

- If an order line is associated with a work order and service appointments do not exist for the work order, an appropriate message displays indicating that an appointment needs to be taken.
- If a work order is cancelled, you can not view any information on the screen.
- If an order is on hold, you can view the hold information. You can also view alert details associated with the hold, if any.
- If the fulfillment method on the order line is different from that on the shipment, you can also view the fulfillment method on the shipment.
- If the shipping address on the order line is different from that on the shipment, the message "The shipping address was modified on this shipment" displays.
- Kit items are shown using an indicator. The tooltip for the kit item indicator displays the parent kit item ID.

Unit Prices are not available for kit items. Therefore, the message "Not Available" displays for the unit price of the kit item. The tooltip for the "Not Available" message displays the parent kit item ID.

2.3.8.1 Viewing Shipment Details

In the Shipment Details screen:

- You can view details about the shipment such as the shipment number, service, ship node, status, seller, and number of containers by clicking on the View Shipment link.
- If you want to reship the shipment, click the Reship Shipment hyperlink. The Reship Select Item screen displays. For more information about reshipping a shipment, see [Section 2.4.6, "Reshipping An Item"](#).
- In the Shipment Lines in this shipment panel, you can view details about the shipment lines such as the identifier of the item or the alternate item, item quantity, unit price, and order number. You can also view the tracking number, container number information, and shipping address.

2.4 Performing Fulfillment Tasks

This section explains how to perform the following fulfillment-related tasks:

- [Modifying Fulfillment Options](#)
- [Fulfillment Summary](#)
- [Modifying Service Instructions](#)
- [Modifying Service Appointments](#)
- [Modifying Order Addresses](#)
- [Reshipping An Item](#)


2.4.1 Modifying Fulfillment Options

When a customer requests a change in the fulfillment options for an item, you can modify the fulfillment options as requested. For example, after the customer places an order for delivery, the customer may decide to pick the items up at a nearby store. In such situations, you can modify the fulfillment options as requested. This task is also used when a customer wants to modify the delivery address for an order line. To modify the fulfillment options, you must first search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

To modify the fulfillment options:

1. From Tasks > Fulfillment, select Change Fulfillment Options. The Change Fulfillment Options screen displays.
2. Check the boxes of the items for which you want to modify the fulfillment options.
 - If you want to modify the fulfillment options for all items on the order, check the Check All box.
 - You can view the expected date of fulfillment for the order line in the Expected Date column. The expected date of fulfillment does not display for the order line, if:
 - The requested pickup date does not exist.
 - The work order appointment is not created.

Note: If you want to modify the fulfillment option for a parent item that has related lines, the fulfillment method for the related lines is automatically selected for modification. You can clear the checkboxes of the appropriate related lines for which you do not want to modify the fulfillment option.

Note: The recently added order lines are identified by the  icon.

Note: All order lines that are associated with drop ship lines are disabled.

3. Choose the appropriate fulfillment method.
4. When the customer wants to pick up items from the store, choose the "Pickup" fulfillment method.
 - a. Select the country in which the store is located from the drop-down list.
 - b. Enter the zip code or city, and state.
 - c. Click Search. The More Stores screen displays. For more information about viewing inventory in other stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
 - d. Select the appropriate store and click Apply.
 - e. Click Next. The Fulfillment Summary Screen displays. For more information about fulfillment summary details, see [Section 2.4.2, "Fulfillment Summary"](#).
5. When the customer wants the items to be shipped, follow these steps:
 - a. Choose the Ship fulfillment method. The Ship To address must be entered.
 - Select an address and click the Edit Address hyperlink to modify the address and click Apply.

- Click the New Address hyperlink to enter a new address and click Apply.

For more information about adding new addresses or modifying the existing address, see [Section 2.3.2.3, "Adding or Modifying Addresses"](#).

Note: A fulfillment method can be selected only if the item supports the selected fulfillment method.

- From the Service drop-down list, select the appropriate carrier service that the customer requests for item delivery.
- Click Apply.
- If you skip the customer identification step when capturing the order, you must enter an address for all the order lines that are being shipped or delivered.
- Click Next.
 - The Fulfillment Summary screen displays where you can view and modify the complete configuration of an order and how it is being fulfilled. For more information about fulfillment summary, see [Section 2.4.2, "Fulfillment Summary"](#).

Note: The Fulfillment Summary screen displays only if the fulfillment method is either Ship or Pickup.

- The Select an Appointment screen displays where you can select or modify a service appointment for the items. For more information about modifying service appointments, see [Section 2.4.4, "Modifying Service Appointments"](#).
 - After you select an appropriate appointment, the Confirm Payment screen displays where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).
- When the customer wants the items to be delivered to their doorstep, follows these steps:

- a. Choose the Delivery fulfillment method. The Deliver To address must be entered.
 - Select an address and click the Edit Address hyperlink to modify the address and click Apply.
 - Click the New Address hyperlink to enter a new address and click Apply.

For more information about adding new addresses or modifying the existing address, see [Section 2.3.2.3, "Adding or Modifying Addresses"](#).

Note: Based on the configuration, the Fulfillment option displays. For more information about displaying the Shipping and Delivery as a separate fulfillment option, see the *Sterling Customer Order Management PCA Implementation Guide*.

Note: You can modify any order line that has the Delivery fulfillment method until the delivery line is shipped.

- b. If you skipped the customer identification step when capturing the order, enter the address for all order lines that are being delivered.
 - c. Click Next.
 - The Select an Appointment screen displays where you can select or modify a service appointment for the items. For more information about modifying service appointments, see [Section 2.4.4, "Modifying Service Appointments"](#).
 - After you select an appropriate appointment, the Confirm Payment screen displays where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).
7. When the customer wants to change the address for the provided service line:

- a. Select all service lines in the list. The Service Address panel displays.
 - Select an address and click the Edit Address hyperlink to modify the address and click Apply.
 - Click the New Address hyperlink to enter a new address and click Apply.

For more information about adding new addresses or modifying the existing address, see [Section 2.3.2.3, "Adding or Modifying Addresses"](#).


- b. Click Next. The Fulfillment Summary Screen displays. For more information about the fulfillment summary details, see [Section 2.4.2, "Fulfillment Summary"](#).

2.4.2 Fulfillment Summary

The Fulfillment Summary screen provides information about how an order is created and is being fulfilled. For instance, you can view the details of an order such as the recently added order lines, gift items, open box items, related items, and so forth. You can group order lines based on the fulfillment method. To modify the fulfillment options, you must first search for the order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).

2.4.2.1 Fulfillment Method—Shipping Panel

You can view the fulfillment summary for the "Shipping" fulfillment method.

- The address to where the item is shipping displays in the header panel, if the fulfillment method is "Shipping".
- The  icon indicates that the item is a gift item and can be picked up or shipped to the gift recipient. For more information about setting up gift options, see [Section 2.5.1, "Setting Up Gift Options"](#).
- The open box icon indicates that the item is an open box item. For more information about open box items, see [Section 3.3.7, "Adding Open Box Items"](#).
- The item image displays an image of the actual item.
- The item description and the item identifier display.

Note: The recently added order lines are identified by the ✱ icon.

- The Quantity column displays the order line quantity.
- The Unit Price column displays the item price for one unit.
- The Available column displays the latest date when the product is available. If items are unavailable, the column displays in red indicating unavailability.
- The Level of Service column enables you to change the carrier service with cost from the drop-down list.

Note: Whenever the carrier service is changed, the expected delivery date is updated to reflect the change.

- The expected delivery column displays the expected delivery dates of the items.
- You can choose the following actions from the drop-down list:
 - Change to Pickup
 - Cancel

Note: When the parent line that has related lines is selected for cancellation, the related lines are automatically selected for cancellation.

When the action is changed from Shipping to Change to Pickup, the screen returns to the Change Fulfillment Options screen and the system automatically checks the box against each modified order line. For more information about the fulfillment options, see [Section 2.4.1, "Modifying Fulfillment Options"](#).

- Click the Gift Options button to modify the gift options for the selected items. You must check the box for the item for which you want to add or clear the gift information. For more information about gift options, see [Section 2.5.1, "Setting Up Gift Options"](#).



- Click Go to the Change Fulfillment Options, if you want to make changes to the fulfillment methods. For more information about changing fulfillment options, see [Section 2.4.1, "Modifying Fulfillment Options"](#).


Note: If you select the parent line that has related lines associated with it to perform actions such as modification or cancellation, the related lines are automatically selected for modification or cancellation.

- Click Confirm or Next. All items in the order line are reserved.
- Click Next. The Confirm Payment screen displays where you can view the payment details for an order. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).


2.4.2.2 Fulfillment Method—Pickup Panel

You can view the fulfillment summary for the "Pickup" fulfillment method.

- If the fulfillment method is "Pickup", the ship node displays.
- The  icon indicates that the item is a gift item and can be picked up by the recipient. For more information about setting up the gift options, see [Section 2.5.1, "Setting Up Gift Options"](#).
- The  icon indicates that the item is an open box. For more information about open box items, see [Section 3.3.7, "Adding Open Box Items"](#).
- The item image displays an image of the actual item.
- The item description and the item identifier display.

Note: The recently added order lines are identified by the  icon.

- The Quantity column displays the item quantity.
- The Unit Price column displays the item price for one unit.

- The Preferred column displays the date on which the customer prefers to pick up the item. Click the  icon to modify the preferred date for picking up the item. The calendar displays the dates from the initial product ship date. If the product ship date is blank, the calendar does not display any dates.
- The Available column displays the latest date when the product is available in the ship node.
- You can choose any of the following actions from the drop-down list:
 - Change to Shipping
 - Cancel

When the action changes from Pickup to Change to Shipping, the screen returns to the Change Fulfillment Options screen and the system automatically checks the box against each modified order line. For more information about modifying the fulfillment options, see [Section 2.4.1, "Modifying Fulfillment Options"](#)

- Click the Gift Options button to modify the gift options for the selected item. You must check the box for the item for which you want to add or clear the gift information. For more information about setting up gift options, see [Section 2.5.1, "Setting Up Gift Options"](#).
- Click the Pickup Locations button to select the location from where you want to pick up the items. You must check the box of the item you want to pick up from an alternate store. For more information about alternate pickup locations or stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
- Click Go to Change Fulfillment Options, if you want to make changes to the fulfillment method. For more information about the fulfillment options screen, see [Section 2.4.1, "Modifying Fulfillment Options"](#).
- Click Confirm. All items in the order line are reserved.
- Click Next. The Confirm Payment screen displays where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).

Note: When the next button is clicked, reservations are created for all the unscheduled, unreserved lines and quantities. If some quantity of items are unavailable, and a reservation cannot be created entirely, you revert back to the Fulfillment Summary screen highlighting the unavailable lines.

Note: When modifications are made in the Fulfillment Summary screen, the screen is refreshed to reflect the updated information.

2.4.3 Modifying Service Instructions

When a customer requests a change in the service instructions for an item, you can modify the service instructions as requested. For example, if the customer is not available at home at the time of delivery, the customer may request that the items are left at the back doorstep. You can modify the service instructions accordingly. To modify service instructions, you must first search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

To modify the service instructions:

1. From Tasks > Fulfillment, select View/Change Service Instructions. The View/Change Service Instructions screen displays.
2. In Service Instructions, enter the appropriate delivery instructions for the order.

Note: The Sterling Customer Order Management PCA enables you to modify the instructions for deliveries that are not complete.

3. If you want to change the service appointment for the order, click the Change Appointment hyperlink. The Select An Appointment screen displays. For more information about changing service appointments, see [Section 2.4.4, "Modifying Service Appointments"](#).

4. In the Notes panel, you can add any additional information related to the service transaction. For more information about adding order notes, see [Section 2.3.4, "Adding Notes to an Order"](#).
5. Click Confirm.



Note: You can modify service instructions for any order line that has the Delivery fulfillment method and are not shipped.

2.4.4 Modifying Service Appointments

When a customer requests a change in the service date and time, you can change the service appointment for a product or service item.

To change a service appointment:

1. Do one of the following to open the Select An Appointment screen:
 - From the Change Service Instructions screen, click the Change Appointment hyperlink.
 - From Tasks > Fulfillment, select Change Service Appointment. The View/Change Service Instructions screen displays.

Note: In the View/Change Service Instructions screen, the completed service appointments are represented by the  icon, and the incomplete service appointments are represented by the  icon.

Note: You can modify the service appointment for a product or service item only if the existing appointment is not complete.

2.4.4.1 Selecting a Service Appointment

To select a service appointment:

1. Select the slot or day to deliver items.

The legend provided in the calendar explains the different time slots that are available.

Note: The screen displays either days or slots based on rules configured. For more information about configuring service appointments calendar view, see *Sterling Customer Order Management PCA Implementation Guide*.

2. To change the calendar view for the selected appointment, click any one of the following hyperlinks:
 - Switch to Day View—Select a day. The slots available for that day displays to the right. Select the slot for which you want to create the service appointment.
 - Switch to Slot View—Select the desired slot from the list of slots that displays to the left. The days available for the selected slot displays for which you can create the service appointment.
3. Click the left or right arrow in the calendar to select the appropriate month. By default, the current month displays in the calendar.
4. Click Confirm. The date and time on which the service is fulfilled displays.

2.4.5 Modifying Order Addresses

Sometimes a customer provides incorrect order address information when placing an order. In such situations, the customer may request that you modify the order address. To perform this task, you must first search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

To modify the address for an order:

1. From Tasks > Fulfillment, select Change Order Address. The Change Order Address screen displays where you can view one or more addresses provided by the customer.
2. To modify an existing address, click the Modify Address hyperlink in the appropriate Address panel. The Edit Address screen displays. You can modify the address accordingly.

If you want to override the address verification, check the Override Address Verification box in the Edit Address screen.

3. Click Confirm.

- If the modified address is not valid, the message "This is not a valid address" displays.
- If there are previously released order lines, you cannot modify the address for these order lines. The Previously Released Order Lines screen displays with the message "The address of the following items cannot be modified". You can view the item details for the previously released order lines.
- If an item is not available for shipping, the Delivery Modification Can Not Be Fulfilled screen displays with an appropriate message.
 - If the customer wants to pick the item up from the store, choose the Pick up this item from <store_name> option. If the customer wants to pick the item up at a store that is not listed in the drop-down list, click the More Stores hyperlink. The More Stores screen displays. For more information about viewing inventory in other stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
 - If the customer wants the fulfillment option to be modified regardless of any back order, choose Modify the Fulfillment Option Regardless of BackOrder.
 - If the customer does not want the fulfillment option to be modified, choose Do not modify the fulfillment option for this item.
- 4. If the customer does not want to change more addresses, click Next. If the items need to be delivered, the View/Change Service Instructions screen displays. For more information about modifying service instructions, see [Section 2.4.3, "Modifying Service Instructions"](#).

2.4.6 Reshipping An Item

Sometimes a customer reports that the item that was ordered has not been received or has been damaged in transit. In such situations, you may have to reship the items or issue a refund to the customer for the shipment. You can reship only those items that are in the "Shipped" or "Delivered" status.

To reship an item, you must track the item. For more information about tracking an item, see [Section 2.3.8, "Tracking an Item or Inquiring About a Shipment"](#).

To reship an item:

1. In the Shipment Inquiry screen, click the View Shipment hyperlink. The Shipment Details screen displays.
2. Click the Reship Shipment hyperlink. The Lines to Reship screen displays. The Reship Shipment hyperlink is visible only if the items are in "Shipped" or "Delivered" status.
3. From the Reasons For Reship drop-down list, select the appropriate reasons for reshipping the item.
4. Check the boxes of the items you want to reship.
5. In the Quantity To Reship column, modify the reship quantity, if applicable.
6. Click Next. The Reship or Refund screen displays. In the Available Items panel, you can view items that are available for reshipping. In the Unavailable Items panel, you can view items that are not available for reshipping.

Note: If reshipping is not allowed for items, in the Lines to Reship screen, select the Override Address Verification condition or the Create Follow-Up Alert condition.

7. If you want to reship all available items, in the Available Options panel, select Reship Available Items.
8. If you want to reship all available items and need to issue a refund for items that are not available, choose Reship Available Items and Refund Unavailable Items.
9. If you need to issue a refund for all items, choose Create Refund for All Items.
10. Click Next.

If the items need to be delivered, the Select An Appointment screen displays. You can modify the service appointment of the items. For

more information about modifying service appointments, see [Section 2.4.4, "Modifying Service Appointments"](#).

11. The Confirm Payment screen displays. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).

2.5 Performing Other Tasks on an Order

Some miscellaneous tasks you may need to perform for a customer, include:

- [Setting Up Gift Options](#)
- [Appeasing Customers](#)
- [Matching an Item's Price](#)
- [Adding a Coupon or Promotion Code](#)
- [Changing Payment Methods](#)
- [Viewing Payment Details](#)
- [Inquiring About Returns and Exchanges](#)

2.5.1 Setting Up Gift Options


When a customer wants to buy an item and gift it to someone, you can set the gift options in any one of the following ways:

- The customer places an order at the store and wants the gift recipient to pick it up from the same store or an alternate store. In such situations, the CSR marks the item as a gift item and captures the recipient details.
- The customer places an order at the store and realizes that the gift recipient cannot pick up the item. In such situations, the customer decides to pick up the item.
- The customer places an order at the store and wants the store to ship the items to the recipient as gift items. In such situations, the CSR marks the items as gift items and captures the shipping address of the recipient.

2.5.1.1 Gift Options for Pickup

This section provides the steps to be performed if the customer or the gift recipient wants to pick up gift items from the store.

To set the gift options for pickup:

1. From Tasks > Fulfillment, select Fulfillment Summary. The Fulfillment Summary screen displays.
2. Check the boxes next to the items you want to assign as gifts.
3. Click Gift Options. The Gift Recipient Details screen displays.
4. Choose Enter Gift Recipient Details to enter the recipient's First Name, Last Name, and the Phone number.
5. The  icon displays against the appropriate gift item.
6. Choose Clear Gift Recipient Details if you no longer want the item to display as a gift item.
7. Click Apply.

2.5.1.2 Gift Options for Shipping

This section provides the steps to be performed if the customer wants the gift items to be shipped.

To set the gift options for shipping:

1. From Tasks > Fulfillment, select Fulfillment Summary. The Fulfillment Summary screen displays.
2. Check the boxes next to the items you want to assign as gifts.
3. Click Gift Options. The Gift Recipient Details screen displays.
4. Choose Mark Shipping Line as Gift which chooses the shipping address captured during order capture.
5. Choose Clear Gift Recipient Details if you no longer want the item to display as a gift item.
6. Click Apply.

2.5.2 Appeasing Customers

When a customer reports not being satisfied or has had a bad experience with any of the services that were provided, you can present them with

an option to appease them. For example, a customer may report problems faced when placing an order online or report having received a damaged item. In such situations, you need to perform an appeasement task to make amends for the bad experience. To perform this task, you must first search for the order. For more information about how to search for an order, see [Searching for an Order or Item](#).

To appease a customer:

1. From Related Tasks > Other Tasks, select Customer Appeasement. The Customer Appeasement: Select Reasons screen displays.
2. From the Reason For Appeasement drop-down list, select the applicable appeasement reason.
3. Select "This appeasement applies to the entire order", if the appeasement applies to the entire order.
4. Select "This appeasement applies to specific items", if the appeasement applies to some of the items of the order.
Check the boxes of the applicable items for which the appeasement applies.
5. To view any additional notes for the order, click the View/Add Notes hyperlink. For more information about viewing order notes, see [Section 2.3.4, "Adding Notes to an Order"](#).
6. In the Previous Appeasements panel, you can view appeasements that were previously applied to the order.

Important: If there are previous appeasements for an order, consider another appeasement.

7. Click Next. The Customer Appeasement: Select Offer screen displays.
8. In the Appeasement Action panel, select the offer that is applicable for the appeasement. The preferred appeasement option displays in bold. Use your best judgement when deciding which option to apply to the order.

Note: If the user has permission, a text box displays which enables the user to manually enter a suitable appeasement offer.

9. In the Notes panel, you can view appropriate notes regarding the appeasement action. You can add other information on the order and modify notes, if applicable. For more information about viewing or entering order notes, see [Section 2.3.4, "Adding Notes to an Order"](#).
10. Click Confirm.

2.5.3 Matching an Item's Price

A customer may discover that another retailer is selling the same items that were ordered at a lesser price. In such situations, you may look into the customer's claims and price match the items, if necessary. To perform a price match for an item, you must first search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

To perform a price match for an item:

1. From Tasks > Other Tasks, select Price Match An Item. The Price Match: Select An Item screen displays.
2. In the Items to Price Match panel, check the box of the item for which you want to match the price.

Note: The order lines for which reshipping is applied are not available for price match. The order lines that are cancelled are greyed out and are not available for price match.

3. If an order line is not available for price match, click on the Manual Override hyperlink to manually override the price match. The Order Notes window displays. You can enter appropriate notes on the order. For more information about entering order notes, see [Section 2.3.4, "Adding Notes to an Order"](#).

Important: The Manual Override hyperlink displays on the screen only if you have permission to override the price match verification.

4. Click Next. The Price Match: Competitor Details screen displays.
5. Enter the name of the new competitor or select the existing competitor's name from the drop-down list.
6. Enter the price offered by the competitor, difference in the shipping charges offered by the retailer and competitor, and minimum quantity to price match.
7. If you want to view the charges applied to the order, click the Charge Details hyperlink. The Order Price Details screen displays. For more information about the Order Price Details screen, see [Section 2.5.3.1, "Viewing Order Price Details"](#).
8. Click Check Price Match.
 - If you find an exact price match offered previously by the competitor, the message "This item can be price matched for \$XXX" displays in a separate panel.
 - If an exact price match is not found, but close price matches are found, the message "Exact price match information could not be found. Please select one of the close matches below or select Manual Verification to perform a manual price match" displays.

Select the appropriate price match from the list of close price matches, if applicable, or click the Manual Verification hyperlink to perform a manual price match.
 - If exact or close price matches are not found, then manual verification is required. The message "No existing price match information found. Please investigate this price match and record results here" displays.

Important: The Manual Verification displays on the screen only if you have permission to manually verify the price match.

Enter the appropriate price match information, and click Check No Hassle Criteria.

The "No Hassle Criteria" for the price match is satisfied if the maximum percentage price difference, maximum unit price difference, and the maximum ordered quantity are specified according to the following "No Hassle Criteria" rules.

- If the price match condition is satisfied, the message "No hassle price match criteria satisfied" displays.
- If the price match condition is not satisfied, the message "No hassle price match criteria not satisfied" displays. You can either override the price match after investigation or create an alert as a reminder to follow up.
- If you have permission to accept the price match, the Override and Accept checkbox displays. Check this box, if applicable.
- If you need to create an alert for this price match, click Create Follow-up Alert. The Alert Details window displays. Enter the alert information and click Create.

Important: The Override and Accept checkbox displays on the screen only if you have permission to override and accept a price match.

- If the system rejects the price match you have performed, an appropriate message displays.
9. In the Notes panel, you can enter any additional notes for the order. For more information about entering order notes, see [Section 2.3.4, "Adding Notes to an Order"](#).
 10. Click Next. The Price Match: Confirmation screen displays. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).

2.5.3.1 Viewing Order Price Details

In the Order Price Details screen, you can view the overall order totals, header price details, line summary details, line price details, and the charge breakup details.

2.5.4 Adding a Coupon or Promotion Code

You can add a coupon or promotion code to an order upon the request of a customer who has already placed an order. You can add any number of coupons to an order. To add a coupon or promotion code to an order, you must first search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#). After finding the order, the system checks the validity of the coupon before applying it to the order.

To add a coupon or promotion code:

1. From Tasks > Other Tasks, select Add a Coupon/Promotion Code. The Add Coupons: Entry screen displays.
2. In Add New Coupon/Promotion Code, enter the coupon or the promotion code.
3. Click Apply.
 - You can view details such as the line sub-total, total charges, total taxes, total discount, and grand total.
 - You can also view the type of coupon or promotion code added and the amount by which the order total is reduced.
 - If the coupon or promotion code cannot be added to the order, an appropriate message displays.
4. Click the Remove hyperlink to remove any coupon or promotion code that is already applied to an order.
5. Click Next. The Add Coupon: Confirm Payment screen displays. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).

2.5.5 Changing Payment Methods

A customer may need to change the mode of payment for an order. To change the payment method for an order, you need to first search for the order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#). To change the payment method for an order:

1. From Tasks > Other Tasks, select Change Payment Method. The Payment Method screen displays.

You can view payment details such as order total, sub-total, charges, taxes, and discounts on the order.

In the Details panel, you can view the payment type, total amount charged, and the total amount refunded.

- a. From the Action drop-down list, select the appropriate action needed for the payment method.
 - To activate the current payment method for an order, select Activate.
 - To suspend the current payment method for any charges, select Suspended for Charges.
 - To suspend the current payment method for any charges and refunds, select Suspended for Charges and Refunds.
- b. If there is no maximum charge limit specified for the current payment method, from the Unlimited Charges drop-down list, select "YES".
- c. If there is a maximum charge limit to be applied on the current payment method, from the Unlimited Charges drop-down list, select "NO". In the Maximum Charge Limit column, enter the maximum amount that can be collected against the current payment method.

If the customer wants to add a new payment method, click Add New Payment Method. The Add Payment Method screen displays. For more information about adding new payment methods, see [Section 2.5.5.1, "Adding New Payment Methods"](#).

2. Click Confirm.

2.5.5.1 Adding New Payment Methods

A customer may need to add a new payment method for an order. To add a new payment method, you need to first search for the order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).

To add a new payment method:

1. Do one of the following to open the Add Payment Method screen:
 - From the Payment Method screen, select Add Payment Method.

- From the Confirm Payment screen of any task, click Add Payment Method.
2. Enter the information in the applicable fields as described in [Table 2–3](#).

Table 2–3 Add Payment Method

Field	Description
If you select the "Check" payment method:	
Check Number	Enter the check number.
Check Amount	Enter the check amount.
Check Reference	Enter the check reference number.
Maximum Charge Limit	Enter the maximum amount you can collect against this payment method.
If you select the "Credit Card" payment method:	
Credit Card #	Enter the credit card number.
Credit Card Type	Select the type of credit card from the drop-down list.
Expiration Date	Enter the date through which the credit card is valid.
Name on Card	Enter the name of the credit card holder as displayed on the card.
Maximum Charge Limit	Enter the maximum amount you can collect against this payment method.
If you select the "Customer Account" payment method:	
Customer Account #	Enter the customer's account number.
Customer PO #	Enter the customer's purchase order number.
Payment Reference1	Enter the payment reference information, if applicable.
Payment Reference2	Enter the payment reference information, if applicable.
Maximum Charge Limit	Enter the maximum amount you can collect against this payment method.
If you select the "Other" payment method:	
Payment Reference1	Enter the payment reference information, if applicable.
Payment Reference2	Enter the payment reference information, if applicable.

Field	Description
Payment Reference3	Enter the payment reference information, if applicable.
Maximum Charge Limit	Enter the maximum amount you can collect against this payment method.
If you select the "Pre-paid" payment method:	
Transaction #	Enter the transaction number.
Register #	Enter the register number associated with the transaction.
Tender Type	Enter the store payment method used to pre-pay the order. For example, cash or credit card.
Maximum Charge Limit	Enter the maximum amount you can collect against this payment method.
If you select the "Refund Check" payment method:	
Check Number	Enter the check number.
Check Amount	Enter the check amount.
Check Reference	Enter the check reference number, if applicable.
If you select the "Stored Value Card" payment method:	
SVC Card No	Enter the Stored Value Card number.
Payment Reference1	Enter the payment reference information, if applicable.
Payment Reference2	Enter the payment reference information, if applicable.
Payment Reference3	Enter the payment reference information, if applicable.
Maximum Charge Limit	Enter the maximum amount you can collect against this payment method.

3. If you use a credit card for the payment, click Next. The Add Bill To Address screen displays.

Check the "Use the Bill To address specified in the order" box to use the same bill to address as the original order, or manually enter the bill to address information.

4. Click Confirm.

2.5.6 Viewing Payment Details

You can view payment details for a customer's order such as charges, refunds, and payment methods. To view payment details for an order, you must first search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

To view payment details, from Tasks > Other Tasks, select View Payment Details. The Payment Inquiry screen displays. For more information about viewing payment details, see [Section 2.2.2, "Why was I charged?"](#).

2.5.7 Inquiring About Returns and Exchanges

Customers may call to ask questions regarding returns, exchanges, and refunds for an order. To provide answers to the customer, you must first search for the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

1. Do one of the following to open the Return/Exchange Details screen:

- From Tasks > Frequent Queries, select Have you received my returns?
- From Tasks > Frequent Queries, select Where are my exchange items?
- From Tasks > Frequent Queries, select Why wasn't I refunded?
- From Tasks > Frequent Queries, select How much will I be refunded?
- From Tasks > Other Tasks, select View Return/Exchange Details.

In the Return/Exchange Details panel, you can view the total return value, total exchange value, total refund amount, amount refunded, and pending refund.

You can view details about the return items such as the item ID and description, item quantity, unit price, status, and the return reason.

If the order has exchange items, you can view details about the exchange items such as the item ID and description, item quantity, unit price, the expected shipment date (ESD), and the fulfillment option.

To view more information about an exchange order, click on the View Exchange Summary hyperlink. The Order Summary screen for the

exchange order displays. For more information about viewing the order summary screen, see [Section 2.1.3, "Viewing Order Summary"](#).

2. To see the breakup of totals, click the View Details hyperlink corresponding to the total return values or the total exchange values. The corresponding Order Price Details screen displays.
 - In the Header Price Details panel, you can view the price details such as tax applied, charges, discount, and the line total for the order.
 - In the Line Summary Details panel, you can view details of returns or exchanges such as the item ID and description, item quantity, unit price, total price, total charges, total discount, total taxes, and the line total.
 - In the Line Price Details panel, you can view the tax applied, charges, discount, line total, and extended price for each order line.
3. Click the View Details hyperlink corresponding to the amount refunded. The Refund Details screen displays where you can view the refund amount, amount applied to an exchange (if available), and the total return value processed.
4. Click Close.

2.6 Performing Alert and Queue Management Tasks

The Alert Management tasks enable you to create, resolve, and assign alerts. Typically, alerts are either raised by the system or created by you. For example, when scheduling an order, the system may hit a predefined error condition such as 'inventory not found'. In such situations, alerts are created against an order and assigned to the appropriate queue to ensure that they are resolved. Similarly, you can also create alerts and assign them to a queue. The Alert and Queue Management task also provides an alert statistics report. This report provides visibility into alerts that are assigned to a specific user or queue.

The alert and queue management tasks include:

- [Creating Alerts](#)
- [Viewing Alert Information](#)

- [Searching for Alerts](#)
- [Notifying Users of Assigned Alerts](#)
- [Assigning Alerts to a User](#)
- [Moving Alerts to a Queue](#)
- [Viewing the Next Alert](#)
- [Closing Alerts](#)

2.6.1 Creating Alerts

You can create new alerts in the system and log notes for future reference.

To create an alert:

1. From Tasks > Alerts, select Create Alert. The Create Alert screen displays.
2. From the Alert Type drop-down list, select the appropriate alert type.
3. In the User field, enter the appropriate user identifier.
If you do not know the user's identifier, click the Find User hyperlink. The Find User screen displays. For more information about searching for a user, see [Section 2.6.1.1, "Searching for a User"](#).
4. In the Priority field, enter the priority for the alert.
5. In the Queue field, you can view the assigned queue for the alert. To assign the alert to a different queue, select the appropriate queue from the drop-down list.
6. If you need to create a follow-up date for the alert, enter an appropriate date in the Follow-up Date field.
7. In the Associated Order field, enter the order number associated with the alert.
8. To search for the order, click the Find Order hyperlink. The Order Search screen displays. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).
9. In the Details panel, enter the appropriate alert details.
10. Click Create.

2.6.1.1 Searching for a User

To search for a user:

1. In the User Id Contains field or the User Name Contains field, enter the appropriate information.
2. Click Find User. A list of users that matches the search criteria displays.
3. Double-click the appropriate user's identifier.

2.6.2 Viewing Alert Information

You can view a list of alerts that are due for follow-up actions, all open alerts that are categorized by alert types, and all queues to which the current user is subscribed.

To view the alert information:

1. From Tasks > Alerts, select View My Alerts and Queues. The Alert/Queues screen displays. You can view a tree structure that provides a list of various alerts and queues.

The tree structure contains one or more of the following:

- My Queues—Displays all queues to which the user is subscribed. The number within the parenthesis indicates the total number of open alerts assigned to the user in that particular queue.
 - My Alerts—Displays all alert types assigned to the user. The number within the parenthesis indicates the number of open alerts assigned to the user.
 - My Alerts Due For Follow-Up—Displays alerts assigned to the user that are due for follow-up.
2. Select an alert or queue for which you want to view details.
 - If only one alert or queue exists, the Alert Details screen displays. You can view the alert or queue information appropriately.
 - If multiple alerts or queues exist, a list of alerts or queues displays. Select the alert or queue for which you want to view the details.

2.6.3 Searching for Alerts

You may sometimes need to search for alerts that are already created.

To search for an alert:

1. From Tasks > Alerts, select Alert Search. The Alert Search screen displays.
2. Enter the appropriate search criteria.
3. Click Search. You can view the alert details.

2.6.3.1 Viewing Alert Details

You can view the details of alerts that meet your search criteria.

- If only one alert matches your search criteria, the Alert Details screen displays where you can view the detailed information about the alert.
- If there are multiple alerts that match your search criteria, a list of alerts displays. Double-click the appropriate alert. The Alert Details screen displays. You can view the appropriate alert details depending on the type of alert.
- If you want to change the status of the alert, select the appropriate alert status from the Alert Status drop-down list and click Save.
- If you want to modify the follow-up date for the alert, enter the appropriate date in the Follow-up Date field and click Save.
- In the Notes panel, you can view any additional information about the alert.
- If you want to enter notes regarding alerts, click on the Add Note hyperlink. The Add Notes for the Alert screen displays.

To add notes:

- a. From the Contact Method drop-down list, select the appropriate contact method.
- b. In Contact Details, enter the appropriate information.
- c. Enter notes regarding alerts. Select the appropriate emoticon (smiley) for the alert notes, if applicable.
- d. If you want to view the alert notes along with the associated order, check the Save Note on Associated Order box.

- e. Click Add Note. You can view the notes in the Notes panel.
- Click Close to close the Alert Details screen.

2.6.4 Notifying Users of Assigned Alerts

You can be notified of open alerts assigned to you or to the queues to which you are subscribed.

Users are notified of assigned alerts in any one of the following ways:

- The number of open alerts displays in the CSR message panel as a Number of Open Alerts hyperlink. For example, 24 Open Alerts. Click on this hyperlink.
 - The number of open alerts assigned to the current user displays, if configured for the user.
 - The number of priority 1 alerts displays, if configured to display alerts for queues to which the current user is subscribed.

Note: The Number of Open Alerts hyperlink is refreshed regularly based on the polling time configuration.

Upon clicking the Number of Open Alerts hyperlink, if there is only one open alert, the View Alert Details screen displays. Otherwise, the Alert Search and List screen displays. For more information about viewing alerts, see [Section 2.6.2, "Viewing Alert Information"](#). For more information about searching for alerts, see [Section 2.6.3, "Searching for Alerts"](#).

- Based on the polling time configuration, a window pops up with a beep. A hyperlink on the pop-up window displays:
 - The number of open alerts assigned to the current user, if configured for users. If there are no open alerts assigned to the current user, the follow-up alerts assigned to the user display.
 - The number of priority 1 alerts added to the queue to which the current user is subscribed, if configured to display alerts for queues.

2.6.5 Assigning Alerts to a User

Sometimes, an alert task needs to be addressed by a particular user. For example, some alerts may require a CSR Lead to perform the necessary action. In such situations, you can assign alerts to a specific user.

To assign alerts to different users:

1. Search for the alert. For more information about searching for an alert, see [Section 2.6.3, "Searching for Alerts"](#). The Alert Details screen displays.
2. From the Alert Details screen > Tasks > Alert, select Assign To User. The Assign To User screen displays.

In the Currently Assigned To User Id field, you can view the identifier of the user to whom the alert is currently assigned.

3. In the Assign To User Id field, enter the appropriate identifier of the user.

If you do not know the user's identifier, click the Find User hyperlink. The Find User screen displays. For more information about searching for a user, see [Section 2.6.1.1, "Searching for a User"](#).

4. In the Notes panel, enter any additional notes about assigning the alert to a particular user, if applicable.
5. Click Assign.

2.6.6 Moving Alerts to a Queue

You can move a particular alert to a different queue.

To move an alert to a different queue:

1. Search for the alert. For more information about searching for an alert, see [Section 2.6.3, "Searching for Alerts"](#). The Alert Details screen displays.
2. From the Alert Details screen > Tasks > Alert, select Move To Queue. The Move To Queue screen displays.

In the Currently Assigned To Queue Id field, you can view the identifier of the queue to which the alert is currently assigned.

3. In the Assign To Queue Id field, enter the appropriate queue identifier.

4. To search for a queue, enter the appropriate information in the Queue Id Contains or the Queue Name Contains fields.
5. Click Find Queue. The list of queues matching the search criteria displays.
6. Double-click the appropriate queue identifier.
7. You can add any additional notes about assigning the alert to a particular queue in the Notes panel, if necessary.
8. Click Assign.

2.6.7 Viewing the Next Alert

This task considers all open alerts that are not assigned to any user. These alerts are assigned to a user based on the alert priority as follows:

- An alert with the highest priority is considered first.
- An alert with the earliest follow-up date is considered next.
- An alert with the earliest creation time is considered next.

To view the next alert that may be assigned to you:

1. From Tasks > Alerts, select Get Next Alert.
 - If alerts are available, the Alert Details screen displays where you can view the alert information.
 - If alerts are not available, the message "No Assigned Alerts Available" displays.
2. Click Close.

2.6.8 Closing Alerts

You can close alerts that have been resolved or are no longer valid.

To close an alert:

1. Search for the alert. For more information about searching for an alert, see [Section 2.6.3, "Searching for Alerts"](#). The Alert Details screen displays.
2. From the Alert Details screen > Tasks > Alert, select Close Alert. The Close Alert screen displays. You can view the identifier of the user who closed the alert.

3. In the Notes panel, enter the appropriate notes, if applicable.
4. Click Save.

Tasks for a Store Representative

The role of a store representative is to capture and maintain an order through the Sterling Customer Order Management PCA. The store representative typically deals directly with the customer and takes action on an order in response to a customer visiting the customer service counter at the store.

The Store Order Management application provides keyboard shortcuts using which the store representative can easily execute tasks. For more information about using keyboard shortcuts, see [Chapter 1, "Using the Sterling Customer Order Management PCA Dialogs and Windows"](#).

A store representative may frequently be:

- [Searching for an Order or Item](#)
- [Answering Frequent Queries](#)
- [Performing Order Tasks](#)
- [Performing Fulfillment Tasks](#)
- [Performing Other Tasks on an Order](#)
- [Performing Order Print Tasks](#)
- [Performing Alert and Queue Management Tasks](#)
- [User Security](#)

3.1 Searching for an Order or Item

This task assumes that you need to take some action on an existing order or item in the Sterling Customer Order Management PCA. A customer may walk into the store to inquire about the order placed at

the store. Generally, the customer knows the order number or has more information to help you locate the order or item.

3.1.1 Searching for an Order

If you know the order number, telephone number, or the e-mail address of the customer, use the Quick Access screen to directly navigate to the order. For more information about searching for an order, see [Section 2.1, "Searching for an Order or Item"](#).

3.1.1.1 Performing an Advanced Order Search

Using additional options, you can make your order search more precise and view more information about the order number, customer's telephone number, or the customer's e-mail address. For more information about performing an advanced order search, see [Section 2.1.1.1, "Performing an Advanced Order Search"](#).

Using the Sterling Customer Order Management PCA, you can search for existing draft orders and orders that were created in your store. Draft orders are orders in the process of being entered that have not been confirmed.

To search for draft orders:

1. To search for draft orders, enter the appropriate search criteria in the Advanced Order Search screen and check the Show only draft orders box.
2. To search for draft orders in your store, enter the appropriate search criteria and check the Show orders created in this store only box and check the Show only draft orders box.
3. Click Search. Based on your search criteria, in the Order List panel you can view a list of draft orders.

3.1.2 Searching for an Item

If you know the identifier, description, or the manufacturer's name of the item you are searching for, you can use the Quick Access screen to directly navigate to the item.

To search for an item:


1. In the Quick Access screen, enter the complete identifier for the item, partial description of the item, or the complete name of the item manufacturer.
2. Click Find Item.
 - If a single item exists that matches your search criteria, the Item Detail screen displays.
 - If multiple items exist that match your search criteria, the item list displays in the Item List panel. You can view the identifier of the item or the alternate item, description of the item, UOM, available quantity, and unit price of the item. To view the item details, select the item and double-click, select an item and press the enter key, or in the Item Details panel, click the hyperlink. The Item Detail screen displays.
 - If you are unable to find the items for which you are searching, click Show Criteria. In the Item Search Criteria panel, you can enter more restrictive search information. You can also select the type of the item from the Item Type drop-down list and click Search.
 - You can search for the items using the Bar Code scanning. When the store representative scans any item using the barcode scanner, the UPC code is populated in the Item Id field. Using this information, the store representative can search for more details about the item.

When you select an item from the Item List panel, you can view the details of the item in the Item Details panel. To add the item to the order, select Add To Order.

Note: If availability checks are not configured for the system, the Availability column does not display and you cannot check the item availability.

3.1.2.1 Viewing the Product Item Details

In the Item Detail screen, you can view the details of an item such as the extended description of the item, price, manufacturer or brand information, and so forth.

1. In the Availability panel, you can view the quantity of the item available at the store. You can also view information whether the item is available for delivery or pickup. If pickup is allowed for an item, the pickup date displays.
2. If the customer wants to view the availability of the item at other stores, click the View Nearby Stores For Availability hyperlink. The Details of Near-By Stores screen displays.
 - a. Enter the zip code of the area from where you need the item.
 - b. Click Search. You can view a list of all stores associated with the  icon where the item is available. You can also view the store address and the approximate distance of the store from the current location.
3. In the Promotions panel, you can view all promotions associated with the item. For more information about promotions, click the hyperlink in the Short Description column.
4. If the customer wants to create an order for the selected item, click Create Order.
5. If you want to view more details about the item, click More Details. The More Details of Selected Item screen displays.
6. If you want to add the item to the order, click Add to Order.

3.1.2.2 Viewing the Service Item Details

In the Service Item Details screen, you can view the details of provided services such as the service description, price, UOM, and the availability of the service item.

To view the details of a service item:

1. In the Availability panel, select the country name from the drop-down list from where the customer wants to check the availability of the service item and enter the city, state, and zip code.
2. Click Check Availability. If the service is available, the message "This location can be serviced" displays. Click the View Calendar hyperlink. You can view the service appointments.
3. In the Promotions panel, you can view all promotions associated with the service item. For more information about promotions, click the hyperlink in the Short Description column.

4. If you want to create an order for the selected item, click Create Order.
5. If you want to add service items to the order, click Add to Order.

3.1.2.3 Viewing More Details of the Selected Product Items

You can view more details of the selected product items.

- To view more information about the item's accessories, click the Accessories tab. You can view the identifier of the item or the alternate item, the item's description, associated quantity, and the unit price of all accessories associated with the item.
- To view the kit details, click the Kit Details tab. You can view the kit components, item's description, and the kit quantity.
- To view the item's specifications, click the Specifications tab.
- To view the items for upsell, click the Upsell tab. You can view the identifier of the item or the alternate item, item's description, associated quantity, and the unit price of all items available for upsell.
- To view the items for substitutions, click the Substitutions tab. You can view the identifier of the item or the alternate item, item's description, associated quantity, and the unit price of all items available for substitutions.
- To view the service options of an item, click the Service Options tab. You can view the identifier of the service item, item's description, associated quantity, whether the service scheduling must be held until the item is delivered, the service time offset in hours (difference between provided service and product delivery), and the unit price of all the services available for the item.

3.1.2.4 Performing an Advanced Item Search

If you do not know the complete details about an item such as the identifier of the item or the alternate item, the item's description, or the manufacturer's name, you can perform an advanced item search.

To perform an advanced item search:

1. Do one of the following to open the Item Search screen:
 - From Tasks > Search, select Advanced Item Search.


- In the Quick Access panel, click Find Item.

In the Item List panel, you can view the item ID, description, available quantity, and the unit price of all items.

2. Select an item in the Item List panel to view more information about the item in the Item Details panel.
 - If you select a product, you can view the identifier of the item, item's description, unit of measure, availability, and unit price.
 - If you select an independent service, you can view the identifier of the item, item's description, unit of measure, and unit price.
3. If you cannot find the items that you are searching for, click Show Criteria to change your search criteria.
4. Choose any one of the following and click Search:
 - Products—Provides a list of items
 - Independent Services—Provides a list of services
5. If you are unable to find the pertinent items, click Show Search Criteria to enter more restrictive search criteria.
6. Double-click on the required item to view the item details.

3.1.3 Viewing Order Summary

A customer may have some queries or may request some changes on an order that is already placed. In such situations, you may want to view the order details before performing any task.

Navigate to the Order Summary screen. In the Origin Store field, you can view the store in which the order was created. If an order line has a note associated with it, the  icon displays in the order line table. Click this icon to view the order line notes.

For more information about viewing the summary of an order, see [Section 2.1.3, "Viewing Order Summary"](#).

3.1.3.1 Viewing the Order Line Summary

To view the order line summary, from the Order Summary screen, right-click on an order line and select View Line Summary. The Line

Summary screen displays. For more information about viewing the order line summary, see [Section 2.1.3.1, "Viewing the Order Line Summary"](#).

In the Important Notes panel you can view any important notes that are added on that order line. To add notes to that order line, click the View/Add Notes hyperlink. The Order Line Notes screen displays. For more information about adding order line notes, see [Section 3.3.10, "Adding Notes to an Order Line"](#).

3.2 Answering Frequent Queries

This section contains some of the questions commonly asked by the customers and provides the answers to these questions.

Customers may call you and ask:

- [Where is my shipment?](#)
- [Why was I charged?](#)
- [Why wasn't I refunded?](#)
- [How much will I be refunded?](#)
- [Have you received my returns?](#)
- [Where are my exchange items?](#)

3.3 Performing Order Tasks

You may perform several tasks on an order that is placed by the customer. Some of the general tasks that you may perform on an order are:

- [Creating an Order](#)
- [Canceling an Order](#)
- [Resolving Holds](#)
- [Creating Store Returns](#)
- [Initiating a Return](#)
- [Adding Order Lines](#)
- [Adding Open Box Items](#)
- [Increasing Order Line Quantity](#)

- [Tracking an Item or Inquiring About a Shipment](#)
- [Adding Notes to an Order Line](#)

3.3.1 Creating an Order

This feature helps you to identify a customer and create an order for the customer. You can enter multiple order lines for an order, modify fulfillment options and appointments, and confirm the payment information as requested by the customer.

A navigation bar displays at the bottom of all screens in the create order task flow. This helps you to understand the sequence of steps to be performed to complete the entire task. The navigation bar also helps you to revisit previous screens easily, if applicable.

To perform the create order task:


1. From Navigator > Order, select Create Order or from Tasks > Order, select Create Order. The Select Enterprise screen displays. Select the appropriate enterprise from the drop-down list.
2. Click Confirm. The Create Order: Customer Identification-Shipping Address screen displays.
3. In Find Existing Customer panel, do any of the following to search the customer information:
 - Enter the daytime telephone information.
 - Enter the e-mail ID of the customer.
 - Enter the last name and first name of the customer.
 - Enter the last name and first few letters of the postal code of the customer.
 - Enter the first name and first few letters of the postal code of the customer.
4. Click Search.
 - If more than one customer is found as a result of your search, a list of customer information displays. Select the appropriate customer information from the list.
 - If customers are not found as a result of your search, the following message displays: "Your search found zero results".



- If more than fifteen customers are found as a result of your search, the following message displays: "Your search resulted in more than 15 matches. Please refine your search criteria". In such situations, you need to enter more restrictive search information.
5. Click Skip this Page, if the customer intends to pick up the items at the store immediately and wants to ensure the availability of items before you enter the customer's information.
 6. In the Customer Ship-To panel, you can modify the Primary Info, Street Address, Contact Information of the customers, if applicable.
 7. If the Bill-To Address of the customer is the same as the Ship-To Address, check the "Use As Bill-To Address" box.
 - If you want to override address verification, check the Override Address Verification box.
 - If you do not want to override address verification and the address verification fails, the message "This is not a valid Address" displays.
 8. Click Next.


If the Bill-To address is not the same as the Ship-To address, the Customer Bill-To screen displays. Enter the appropriate Bill-To information. The Create Order: Add Items screen displays.

Note: If the customer information is not captured initially, the Zip Code displays as a panel on top of the screen. This enables you to enter the zip code and check for the item availability.

Note: If the Bill-To Address of the customer is the same as the Ship-To Address, and if you have not checked the "Use As Bill-To Address" box in the Customer Ship-To panel, you can check this box in the Customer Bill-To Address screen.

9. To search for an item, in the Item column, click the  icon. The Advanced Item Search screen displays. You can add the item to the order in one of the following ways:


- Scan the barcode of the item or the alternate item.
 - In Item ID, enter the identifier of the item or the alternate item.
 - If you have already added an item to the order, click the item name hyperlink. The Item Details screen displays. For more information about viewing the item details, see [Section 3.1.2.1, "Viewing the Product Item Details"](#).
10. To add related product or service items to an order:
- a. Click the  icon. The Related Items screen displays.
 - b. Check the boxes of the items that need to be added to the order.
 - c. Click Add to Order. The related product or service items that you added are indicated by the  icon. The tooltip of the related item indicator displays the parent item description.

Note: The  icon displayed next to the item indicates that the item is a related item.

You can view the related items at the bottom of the screen if your user interface is configured to do so.

Note: When a related line is added to the order, the fulfillment method for the related line is copied from that of the parent line. For example, if the fulfillment method of the parent line is "Pickup", and when a related line is added, the fulfillment method of the related line will also be "Pickup". If the related line does not support the selected fulfillment method, the fulfillment option of the line is set to the default fulfillment method.

11. In the Quantity column, enter the required item quantity.
12. In the UOM column, select the UOM for the item from the drop-down list provided. If a UOM does not exist for an item or if only one UOM exists, this column is not editable.
13. In the Unit Price column, you can view the unit price and list price of the item. The prices shown are according to the Ordering UOM.




14. To override the price of an item, click the Override Price hyperlink. The Override Price for Item screen displays. To override the item price:
 - a. In Overridden Price, enter the new price of the item.
 - b. From the Reasons for Override drop-down list, select the appropriate reason.
 - c. In the Notes panel, enter any additional information, if applicable.
 - d. Click Close.
15. In the Fulfillment Method column, choose the appropriate fulfillment method. If the selected fulfillment method is not available, the message "Not Available" along with an  icon displays. The Pickup, Ship, and Delivery buttons are enabled, and the item availability date displays next to these buttons. The availability date for:
 - Pickup—displays the earliest date on which you can pickup the product from a store.
 - Ship—displays the earliest date on which you can ship the item.
 - Delivery—displays the earliest date on which the product is available.

Note: In case of the Delivery fulfillment method, the item availability date does not indicate the delivery appointment. It only indicates the date on which the product is available. You must take a delivery appointment at a later point.

The availability details do not display if the user interface is not configured to do so.

- If you want the item to be shipped to the customer, choose Ship.
- If you want the item to be delivered to the customer's doorstep, choose Delivery.
- If the customer wants to pick up the item from the current store, choose Pickup.
- If the customer wants to pick up the item from an alternate store, choose the More Stores hyperlink. The More Stores screen

displays. Select the appropriate store from where you want to pick up the item. The selected store displays next to the Pickup option. For more information about viewing inventory in other stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).

- If the order line has already been created with pickup from a store other than the one in which the order is created, and if you want to pick the item from the same store, choose Pickup from (Store Name).
16. In the Line Total column, you can view the order line total.
 17. If the item has accessories, the Accessories panel displays where you can view details about the accessories. To add the accessories to the order, click Add To Order. The Accessories panel displays only when the order line is selected.
 18. To add more lines to the order, click the Add More Lines hyperlink.
 19. To add new service lines, click the Add Independent Services hyperlink. The Item Search screen displays. Select the service you want to add. The service line is added and indicated by the  icon. For more information about performing an advanced item search, see [Section 2.1.2.4, "Performing an Advanced Item Search"](#)
 20. To add an open box item, click the Add Open Box Item hyperlink.
 21. To delete a particular order line, click the  icon associated with the order line.
 22. To add order line notes, click the  icon associated with the order line. For more information about adding order line notes, see [Section 2.3.4.1, "Adding Notes to an Order Line"](#).
 23. Click Next. The Create Order: Choose Fulfillment Method screen displays. For more information about choosing a fulfillment method, selecting an appointment, and viewing payment information, see [Section 3.4.1, "Modifying Fulfillment Options"](#).
 24. Click Next. The Fulfillment Summary screen displays. For more information about the fulfillment summary details, see [Section 3.4.5, "Fulfillment Summary"](#).

Note: The Fulfillment Summary screen displays only if the fulfillment method is either Shipping or Pickup.

Note: If you have not captured the customer information, the Billing Address screen displays for you to enter the billing details.

25. Click Next. The Payment Confirmation screen displays. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).
26. To view or edit the payment details for an order:
 - a. Click the View/Edit Order Payment Details hyperlink. The Order Payment Details screen displays. Modify the charge details at the order level or order line level.
 - b. Select the Charge Override Reason.
 - c. In the Notes panel, enter any additional information, if applicable. For more information about adding notes to an order, see [Section 2.3.4, "Adding Notes to an Order"](#).
 - d. Click Confirm to save the changes and return to the Payment Confirmation screen.

Note: You can only modify the existing charges.


27. Click Confirm.

3.3.2 Canceling an Order

A customer may want to cancel an entire order or only some of the items ordered. The items on an order can be cancelled as long as they are present in the store. For example, you can cancel items that are included in shipment but still present in the store, as requested by the customer.

In the store order management application, you can validate whether or not the items to cancel are present in the store. After you enter the order cancellation details, the Validate Cancellation screen displays. You can

verify whether or not the items to cancel are present in the store. After you complete the manual verification process, click OK.

The order lines that contain local shipments are associated with an  icon. Place your cursor on this icon to view the quantity of items that need manual verification for the changes made.

For more information about canceling an order, see [Section 2.3.6, "Canceling an Order"](#).

3.3.3 Resolving Holds


When performing order modifications, the entire order or just certain order lines may be placed on hold to prevent further modifications. You can resolve holds only if you belong to the user group that has permission to resolve holds. For more information about resolving holds, see [Section 2.3.5, "Resolving Holds"](#).

3.3.4 Creating Store Returns

Customers may want to return or exchange the ordered items. The Create Store Return task that enables you to select items from the order you want to return, enter a return reason, enter exchange items, if applicable, and confirm the payment. To create a return for an order, you must first search for the order. For more information about searching for an order, see [Section 3.1, "Searching for an Order or Item"](#).

To create a return:

1. From Tasks > Order, select Create Store Return. The Create Store Return screen displays.
2. If the customer wants to return the entire order, choose "Select All Available Quantity For Return".
3. If the customer wants to return only a few items on the order, choose "Select Specific Quantity For Return". You can either select the items manually or scan them using a barcode scanner.
 - If you are selecting the items manually:
 - Check the boxes of the items the customer wants to return.
 - In the Enter Qty to Return field, enter the quantity of the item that the customer wants to return.

- In the UOM column, select the UOM for the selected items from the drop-down list, if applicable.
 - If a UOM does not exist for an item or if only one UOM exists, this column is not editable.
 - If you are selecting the items using a barcode scanner, the identifier of the item or the alternate item is populated in the Item field. The item identifier that you last scanned and the UOM of the item displays. Each time you scan an item, the item quantity to be returned increases by 1.
4. If any of the order lines have reship lines associated with them, the Show Reship Items checkbox displays.
 5. If you want to view both original and reship order lines, check the Show Reship Items box. A  icon against the reship order line displays.

Note: If the customer wants to return any reshipped items, they must have received both original and reshipped items.

6. Click Next.
 - If order lines are not available for return on an order, the error message "No Item on this order are available for Return" displays.
 - If you want to select specific quantity for return, and if you have not selected any item, the message "Please select at least one item" displays.
 - If the item quantity entered in the Enter Quantity To Return column exceeds the available quantity for return, the message "Return Quantity is more than the returnable quantity. Please check the Return Quantity and the Return UOM and select the appropriate values" displays.

If the above mentioned validations are passed, the Create Store Return screen displays.

7. From the Return Reason drop-down list, select the appropriate reason for returning the item.

From the Disposition drop-down list, select the appropriate disposition code.

Note: If you cannot return the items due to some return policy constraint, the Override Return Policy checkbox displays. Check this box to override the return policy.

8. If the customer wants to exchange some or all of the returned items, check the "Create An Exchange For This Return" box.
9. If the customer wants to exchange an item for the same item, check the Exchange the item for this item box.

If the same return reason, disposition code, and exchange applies to all items in the order, click Apply to all Items.

10. Click Next.
 - If there are no items for exchange, the Create Return: Customer Identification screen displays. You can enter the customer information, select a fulfillment method, schedule an appointment, and view the payment information.
 - If there are items for exchange, the Create Order: Add Item screen displays.

For more information about performing these tasks, see [Section 3.3.1, "Creating an Order"](#).


3.3.5 Initiating a Return


Customers may want to return or exchange some ordered items. In such situations, you can perform the Initiate Return task for those items that are in the shipped, delivered, or pickup status. For more information about initiating a return, see [Section 2.3.7, "Initiating a Return"](#).

3.3.6 Adding Order Lines

After placing an order, a customer may want to add more of an item or add new items to the order. The store order management application enables you to add multiple items to an order. To add multiple items to an order, you must first search for the order. For more information about searching for an order, see [Section 3.1, "Searching for an Order or Item"](#).

To add multiple items to an order:

1. From Tasks > Order, select Add Lines To Order. The Add Multiple Lines: Add Items screen displays.
2. In the Item column, click the  icon. The Item Detail screen displays. Select the item you want to add to the order and click Add To Order. You are returned to the Add Multiple Lines: Add Items screen.


Note: The newly added order line is identified by the  icon.

3. Perform [Step 9](#) through [Step 25](#) as explained in [Section 3.3.1, "Creating an Order"](#).
4. Click Confirm.

3.3.7 Adding Open Box Items

Sometimes, items are returned due to slight defects. Such items are sold at a discounted price and are added to new orders as open box items.

To add open box items to an order:

1. From Navigator > Order, select Create Order or Tasks > Create Order. The Create Order: Add Items screen displays.
2. Click the Add Open Box Item hyperlink to add open box items. The Add Open Box Item screen displays.
3. Enter the appropriate identifier of the open box item and click OK. The Create Order screen displays. All open box items are indicated by the  icon.


If the open box identifier is invalid, the message "Could not find Open Box Item for <open_box_identifier>" displays.

Note: The quantity of the open box item line cannot be increased as each open box item is considered as a unique item. You cannot change the unit of measure of the open box item.

3.3.8 Increasing Order Line Quantity

Sometimes a customer may want to increase the quantity of one or more items on an order that is already placed. In such situations, you can increase the order line quantity as requested by the customer. The line quantity can be increased for orders that have single or multiple order lines. To increase the order line quantity, first search for the order. For more information about searching for an order, see [Section 3.1, "Searching for an Order or Item"](#).

To increase the quantity of an existing order line:

1. From Navigator > Order, select Increase Line Quantity. The Increase Line Quantity screen displays.
2. In the Increase Line Quantity panel, you can view information about the item such as item description, identifier of the item or the alternate item, unit price, status, ordered quantity of the item, additional item quantity, and available item quantity.
3. In the Additional Quantity column, enter the additional item quantity that is required. When you select the Additional Quantity column, by default, the additional item quantity is set to 1.
4. If the requested additional item quantity exceeds the available quantity, a  icon along with the available item quantity displays in the Available Quantity column.
5. If you cannot deliver the requested additional item quantity on the original delivery date, the following message displays: "The requested quantity cannot be fulfilled. Please add a new order line".
6. In the Notes panel, you can enter any additional information related to increasing the order line quantity. Basic notes display in the Notes panel. You can modify this information as needed. For more information about adding order notes, see [Section 2.3.4, "Adding Notes to an Order"](#).
7. Click Confirm.

If you attempt to add more quantity to an order line that is already released, the system may prompt you to manually verify whether or not you can add quantity to that order line. If you can add quantity, click Verified.

The Confirm Payment screen displays where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).

Note: You cannot increase the quantity of provided service lines. However, if the service line is a related line, and you increase the quantity of the parent item, based on the configuration, the quantity of the service line automatically increases. For more information about configuring provided services, see the *Sterling Product Management Configuration Guide*.

3.3.9 Tracking an Item or Inquiring About a Shipment

Customers may need to know the status of their orders. For example, if a customer does not receive items that were ordered, the customer may inquire about the shipment status. You can determine the shipment status for the order and inform the customer. For more information about tracking an item or inquiring about a shipment, see [Section 2.3.8, "Tracking an Item or Inquiring About a Shipment"](#).

3.3.10 Adding Notes to an Order Line

You may need to enter some additional notes on an order line describing the various actions taken on that order for future reference. The store order management application enables you to add notes at the order line level, thus enabling you to track some important events. For more information about adding order line notes, see [Section 2.3.4.1, "Adding Notes to an Order Line"](#).

3.4 Performing Fulfillment Tasks

This section explains how to perform fulfillment tasks.

- [Modifying Fulfillment Options](#)

- [Modifying Service Instructions](#)
- [Modifying Service Appointments](#)
- [Modifying the Shipping Address](#)
- [Fulfillment Summary](#)

3.4.1 Modifying Fulfillment Options

When a customer requests a change in the fulfillment options for an item, you can modify the fulfillment options as requested. For example, after the customer places an order for delivery, the customer may decide to pick the items up at your store. In such situations, you can modify the fulfillment options as requested. You can also perform this task when a customer requests to modify the delivery address for an order line. To modify the fulfillment options, you must first search for the order. For more information about searching for an order, [Section 2.1, "Searching for an Order or Item"](#).

To modify the fulfillment options:

1. From Navigator > Fulfillment, select Change fulfillment options. The Change Order Fulfillment Options screen displays.
2. Check the boxes of the items for which you want to modify the fulfillment options.
 - If you want to modify the fulfillment options for all items on the order, check the Check All box.
 - You can view the expected date of fulfillment for the order line in the Expected Date column. The expected date of fulfillment does not display for the order line if:
 - The requested pickup date does not exist
 - Or
 - The work order appointment is not created

Note: If the line for which you want to modify the fulfillment option has related lines associated with it, the fulfillment method for related lines also gets updated with the changed fulfillment method as the parent line.

Note: All order lines that are associated with drop ship lines are disabled.

3. Choose the appropriate fulfillment method.
4. When the customer wants to pick up items from the store, choose the "Pickup" fulfillment method.
 - a. If the customer wants to pick up the items from the store where the order was placed, choose Pickup from Current Store.
 If the customer wants to pick up the items from other stores:
 - Choose Select other store.
 - Select the country from the drop-down list where you want to pick up the items.
 - Enter the Zip Code or City, State.
 - Click Search. The More Stores screen displays. For more information about viewing inventory in other stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
 - Select the appropriate store.
 - Click Apply.
 - b. Click Next. The Fulfillment Summary Screen displays. For more information about fulfillment summary details, see [Section 2.4.2, "Fulfillment Summary"](#).
5. When the customer wants the items to be shipped, follow these steps:
 - a. Choose the Ship fulfillment method. The Ship To address must be entered.
 - Select an address and click the Edit Address hyperlink to modify the address and click Apply.

- Click the New Address hyperlink to enter a new address and click Apply.

For more information about adding new addresses or modifying the existing address, see [Section 2.3.2.3, "Adding or Modifying Addresses"](#).

Note: A fulfillment method can be selected only if the item supports the selected fulfillment method.

- b. From the Service drop-down list, select the appropriate carrier service that the customer requests for item delivery.
- c. Click Apply.
- d. If you skip the customer identification step when capturing the order, you must enter an address for all the order lines that are being shipped or delivered.
- e. Click Next.
 - The Fulfillment Summary screen displays where you can view and modify the complete configuration of an order and how it is being fulfilled. For more information about fulfillment summary, see [Section 2.4.2, "Fulfillment Summary"](#).

Note: The Fulfillment Summary screen displays only if the fulfillment method is either Ship or Pickup.

- The Select an Appointment screen displays where you can select or modify a service appointment for the items. For more information about modifying service appointments, see [Section 2.4.4, "Modifying Service Appointments"](#).
 - After you select an appropriate appointment, the Confirm Payment screen displays where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).
6. When the customer wants the items to be delivered to their doorstep, follows these steps:

- a. Choose the Delivery fulfillment method. The Deliver To address must be entered.
 - Select an address and click the Edit Address hyperlink to modify the address and click Apply.
 - Click the New Address hyperlink to enter a new address and click Apply.

For more information about adding new addresses or modifying the existing address, see [Section 2.3.2.3, "Adding or Modifying Addresses"](#).

Note: Based on the configuration, the Fulfillment option displays. For more information about displaying the Shipping and Delivery as a separate fulfillment option, see the *Sterling Customer Order Management PCA Implementation Guide*.

Note: You can modify any order line that has the Delivery fulfillment method until the delivery line is shipped.

- b. If you skipped the customer identification step when capturing the order, enter the address for all order lines that are being delivered.
 - c. Click Next.
 - The Select an Appointment screen displays where you can select or modify a service appointment for the items. For more information about modifying service appointments, see [Section 2.4.4, "Modifying Service Appointments"](#).
 - After you select an appropriate appointment, the Confirm Payment screen displays where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).
7. When the customer wants to change the address for the provided service line:

- a. Select all service lines in the list. The Service Address panel displays.
 - Select an address and click the Edit Address hyperlink to modify the address and click Apply.
 - Click the New Address hyperlink to enter a new address and click Apply.

For more information about adding new addresses or modifying the existing address, see [Section 2.3.2.3, "Adding or Modifying Addresses"](#).

- b. Click Next. The Fulfillment Summary Screen displays. For more information about the fulfillment summary details, see [Section 2.4.2, "Fulfillment Summary"](#).
8. If the customer wants to pick up the items at a nearby store, select Pickup Selected Items From This Store. By default, the local store is selected.
 - a. From the Store Pickup drop-down list, select the store from where the customer wants to pick up the items.

If you cannot find the store in the drop-down list:

 - Click the More Stores hyperlink. The More Stores screen displays.
 - Select the store from where the customer wants to pick up the item.
 - To search for a store located in a particular area, enter the zip code of the area and click Search. A list of available stores displays. Select the appropriate store from the list.
 - Enter the pickup date as requested by the customer.
 - b. Click Apply.
 - c. Click Next. The Confirm Payment screen displays where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).
 9. In certain situations, your store may be processing orders for which the customer has requested a change in the fulfillment options. For example, an order is created and about to be shipped to the

customer from your store, the customer may request to pick the items from the store. In such situations, an appropriate message displays that prompts you to manually verify whether the fulfillment options can be modified. After performing the manual verification process, click Verified.

10. To change the fulfillment options for one or more shipments, click the "Shipments for the order exist for this store" hyperlink. The Change Shipment Fulfillment Options screen displays where you can view shipments from the local ship node.

You can view each shipment in a different panel along with the item details and fulfillment type. The checkbox provided against each shipment panel is enabled only if the shipment is not shipped.

- If the fulfillment method is "Shipping", you can view the shipping address.
 - If the fulfillment method is "Pickup", you can view the pickup date.
11. To view or modify the fulfillment options for one or more order lines, click the "View all order lines" hyperlink. The Change Order Fulfillment Options screen displays. Perform [Step 1](#) through [Step 10](#), if applicable.
 12. Modify the fulfillment method or shipping address of an item appropriately.
 13. Click Apply. A warning message displays prompting you to verify if the changes requested by the customer can actually be made.
 14. Verify if the modifications made can be applied to the item and click Verified.
 15. Click Next. The Confirm Payment screen displays where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.3.6.1, "Viewing and Confirming the Payment Details"](#).

Note: If you cannot modify the fulfillment option for an item, an appropriate message displays.

3.4.2 Modifying Service Instructions

When a customer requests a change in the service instructions for an item at the time of delivery, you can modify the service instructions as requested. For more information about modifying service instructions, see [Section 2.4.3, "Modifying Service Instructions"](#).

3.4.3 Modifying Service Appointments

When a customer requests a change in the service date and time, you can change the service appointment. For more information about modifying service appointments, see [Section 2.4.4, "Modifying Service Appointments"](#).

3.4.4 Modifying the Shipping Address


Sometimes, a customer provides incorrect shipping address information when placing an order. In such situations, the customer may request to modify the shipping address. For more information about modifying the shipping address, see [Section 2.4.5, "Modifying Order Addresses"](#).


3.4.5 Fulfillment Summary


The Fulfillment Summary screen provides information about how an order is created and is being fulfilled. For instance, you can view the details of an order such as the recently added order lines, gift items, open box items, related items, and so forth. You can group order lines together based on the fulfillment method. To modify the fulfillment options, you must first search for the order. For more information about searching for an order, see [Section 3.1.1, "Searching for an Order"](#).

3.4.5.1 Fulfillment Method—Shipping Panel

You can view the fulfillment summary for the "Shipping" fulfillment method.

- The address to where the item needs to be shipped displays in the header panel, if the fulfillment method is "Shipping".
- The  icon indicates that the item is a gift item and can be picked up or shipped to the gift recipient. For more information about setting up gift options, see [Section 3.5.1, "Setting Up Gift Options"](#).

- The  icon indicates that the item is an open box item. For more information about open box items, see [Section 3.3.7, "Adding Open Box Items"](#).
- The item image displays an image of the actual item.
- The item description and the item identifier displays.

Note: The recently added order lines are identified by the  icon.

- The Quantity column displays the order line quantity.
- The Unit Price column displays the item price for one unit.
- The Available column displays the latest date when the product is available. If items are unavailable, the column displays in red indicating unavailability.
- The Level of Service column enables you to change the carrier service with cost from the drop-down list.

Note: Whenever the carrier service is changed, the expected delivery date is updated to reflect the change.

- The expected delivery column displays the expected delivery dates of the items.
- You can choose the following actions from the drop-down list:
 - Change to Pickup
 - Cancel



When the action is changed from Shipping to Change to Pickup, the screen returns to the Change Fulfillment Options screen and the system automatically checks the box against each modified order line. For more information about the fulfillment options, see [Section 3.4.1, "Modifying Fulfillment Options"](#).


- Click the Gift Options button to modify the gift options for the selected items. You must check the box for the item for which you want to add or clear the gift information. For more information about gift options, see [Section 3.5.1, "Setting Up Gift Options"](#).



- Click Go to the Change Fulfillment Options, if you want to make changes to the fulfillment methods. For more information about changing fulfillment options, see [Section 3.4.1, "Modifying Fulfillment Options"](#).
- Click Confirm or Next. All items in the order line are reserved.
- Click Next. The Confirm Payment screen displays where you can view the payment details for an order. For more information about payment confirmation, see [Section 3.5.6, "Viewing Payment Details"](#).

3.4.5.2 Fulfillment Method—Pickup Panel

You can view the fulfillment summary for the "Pickup" fulfillment method.

- The ship node displays, if the fulfillment method is "Pickup".
- The  icon indicates that the item is a gift item and can be picked up by the recipient. For more information about setting up gift options, see [Section 3.5.1, "Setting Up Gift Options"](#).
- The  icon indicates that the item is an open box. For more information about open box items, see [Section 3.3.7, "Adding Open Box Items"](#).
- The item image displays an image of the actual item.
- The item description and the item identifier display.

Note: The recently added order lines are identified by the  icon.

- The Quantity column displays the item quantity.
- The Unit Price column displays the item price for one unit.
- The Preferred column displays the date on which the customer prefers to pick up the item. Click the  icon to modify the preferred date for picking up the item. The calendar displays the dates after the product ship date. If the product ship date is blank, the calendar does not display any dates.
- The Available column displays the latest date when the product is available in the ship node. Click the  icon to override product availability. The override availability icon is enabled only if the order

line is a store node and only if the user has permission to override product availability. If items are unavailable, the column displays in red indicating unavailability. For more information about overriding availability, see [Section 3.4.5.3, "Override Availability"](#).

- You can choose any of the following actions from the drop-down list:
 - Change to Shipping
 - Cancel

When the action changes from Pickup to Change to Shipping, the screen returns to the Change Fulfillment Options screen and the system automatically checks the box against each modified order line. For more information about modifying the fulfillment options, see [Section 3.4.1, "Modifying Fulfillment Options"](#)

- Click the Gift Options button to modify the gift options for the selected item. You must check the box for the item for which you want to add or clear the gift information. For more information about setting up the gift options, see [Section 3.5.1, "Setting Up Gift Options"](#).
- Click the Pickup Locations button to select the location from where you want to pick up the items. You must check the box for the items you want to pick up from an alternate store. For more information about alternate pickup locations or stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
- Click Go to Change Fulfillment Options, if you want to make changes to the fulfillment method. For more information about modifying fulfillment options, see [Section 3.4.1, "Modifying Fulfillment Options"](#).
- Click Confirm. All items in the order line are reserved.
- Click Next. The Confirm Payment screen displays where you can view the payment details for the order. For more information about payment confirmation, see [Section 3.5.6, "Viewing Payment Details"](#).

Note: When the next button is clicked, the reservations are created for all the unscheduled, unreserved lines and quantities. If some quantity of items are unavailable, and a reservation cannot be created entirely, you are reverted back to the Fulfillment Summary screen highlighting the unavailable lines.

Note: When modifications are made in the Fulfillment Summary screen, the screen is refreshed to reflect the updated information.

3.4.5.3 Override Availability

This screen provides visibility to items available in a store. You can also modify the item availability details. This feature is broadly classified into the following ways:

- [System Returns Availability](#)
- [System Returns Unavailability](#)

3.4.5.3.1 System Returns Availability

This is a scenario where the system returns the availability of items in a particular store. If you know whether or not items are available at that store, you can override availability by choosing either of the following:

- Item cannot be physically located in a store. Override the system availability.
- Item is available. Do not change the system availability.

3.4.5.3.2 System Returns Unavailability

This is a scenario where the system returns the unavailability of items in a particular store. You can override availability by choosing either of the following:

- Item is available in a store. Override the system availability.
- Item cannot be located. Do not change the system availability.

3.5 Performing Other Tasks on an Order

Some miscellaneous tasks you may need to perform on an order, include:

- [Setting Up Gift Options](#)
- [Appeasing Customers](#)
- [Matching an Item's Price](#)
- [Adding a Coupon or Promotion Code](#)
- [Changing Payment Methods](#)
- [Viewing Payment Details](#)
- [Inquiring About Returns and Exchanges](#)

3.5.1 Setting Up Gift Options

When a customer wants to buy an item and wants to gift it to someone, you can set up the gift options in any one of the following ways:

- The customer places an order at the store and wants the recipient to whom the item is to be gifted to pick it up from the same store or an alternate store. In this case, you must mark the item as a gift item and capture the recipient details.
- The customer places an order at the store and realizes that the recipient to whom the item is to be gifted is unable to pick it up. In such situations, the customer picks up the item. You must clear the gift flag and recipients information.
- The customer places an order at the store and wants the store to ship the items to the recipient as a gift. In this case, you must mark the item as gift and capture the recipient's shipping address.

For more information about marking items as gift items, see [Section 2.5.1, "Setting Up Gift Options"](#).

3.5.2 Appeasing Customers

When a customer is not satisfied or has had a bad experience with any of the services that were provided, you can present them with the option to appease them. For example, a customer may walk in to a store to report having received a damaged item. In such situations, you need to perform an appeasement task to make amends for the bad experience. For more

information about appeasing customers, see [Section 2.5.2, "Appeasing Customers"](#).

3.5.3 Matching an Item's Price

A customer may discover that another retailer is selling the same items that were ordered at a lesser price. In such situations, you may look into the claims of the customer and price match the items, if necessary. For more information about matching the price of an item, see [Section 2.5.3, "Matching an Item's Price"](#).

3.5.4 Adding a Coupon or Promotion Code

You can add a coupon or promotion code to an order on the request of a customer who has already placed an order. You can add any number of coupons to an order. For more information about adding a coupon or promotion code, see [Section 2.5.4, "Adding a Coupon or Promotion Code"](#).

3.5.5 Changing Payment Methods

A customer may need to change the mode of payment for an order. To change the payment method for an order, you need to first search for the order. For more information about changing payment methods, see [Section 2.5.5, "Changing Payment Methods"](#).

3.5.6 Viewing Payment Details

You can view payment details for an order placed by the customer such as charges, refunds, and payment methods. For more information about viewing payment details, see [Section 2.5.6, "Viewing Payment Details"](#).

3.5.7 Inquiring About Returns and Exchanges

Customers may inquire about returns, exchanges, and refunds for an order. For more information about inquiring about returns and exchanges, see [Section 2.5.7, "Inquiring About Returns and Exchanges"](#).

3.6 Performing Order Print Tasks

A customer may visit a store to either place an order or make some modifications to an existing order, which may result in some payment changes. In such situations, you must issue an order slip of the transaction to the customer.

The following print tasks are performed in the Store Order Management application:

- [Printing Order Creation or Summary Slips](#)
- [Printing Change Order Slips](#)
- [Printing Return Order and Exchange Order Slips](#)

3.6.1 Printing Order Creation or Summary Slips

Whenever you confirm a draft order, you must issue the customer an Order Sales Slip that has a snapshot of the order. Typically, the snapshot displays order lines and payment details.

When you confirm a draft order, the Order Sales Slip is automatically printed. You can also select Print Order task under Order to print the Order Sales Slip. This slip provides the order summary information.

The order can also be printed by selecting the 'Print Order' related task from the Order Summary screen.

For more information about configuring payment options, see the *Sterling Customer Order Management PCA Implementation Guide*.

3.6.2 Printing Change Order Slips

Whenever you make changes to an existing order that results in payment modifications, a Change Order Slip is generated based on how the print options are configured in the Sterling Customer Order Management PCA. A change order slip can be automatically printed, never printed, or the user can be prompted to print the change order slip. Payment modifications include: order cancellation, adding a coupon, increase in the order line quantity, changes in the fulfillment options, and so forth.

3.6.3 Printing Return Order and Exchange Order Slips

When a customer returns items to a store, the Return Order Slip is printed, which provides payment information about the returned items. If the customer requests an exchange of the items, an Exchange Order Slip is printed, which provides payment information about the exchanged order.

3.6.3.1 Printing Return Order Without Exchange Order Slips

If payment is handled externally to the Sterling Customer Order Management PCA, the following return order confirmation screen displays:

Details of Near-By Stores
Your return order has been created.

Quick Access Advanced Order Search Draft Order Y100000089 Order CORP-ShippedPick

Item	Unit Price	Quantity	Return reason
34" LCD TV(TV0001ASF21)	100.00	1.00 Each	Change Of Mind

Print and Close Alt+Shift+P Cancel Return Order Alt+Shift+C

View/Add Notes Alt+Ctrl+N

Contact Method Contact Details ☐ Mark Priority as High

JOHN DOE called to return item(s).

Close Esc

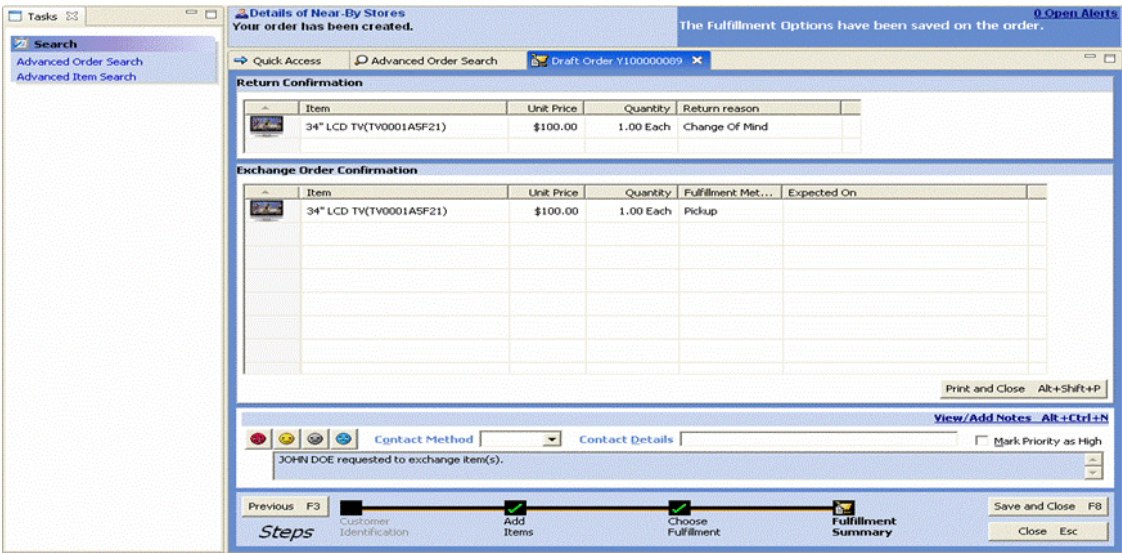
This screen displays only if payment is handled externally. For field value descriptions, see [Table 3–1, "Return Order Without Exchange Order Slip Screen"](#).

Table 3–1 Return Order Without Exchange Order Slip Screen

Field	Description
Print and Close	Choose this button to save any notes to the order, print the order, and close the order tab.
Cancel Order	Choose this button to cancel the order.

3.6.3.2 Printing Return Order With Exchange Order Slips

If payment is handled externally to the Sterling Customer Order Management PCA, the following return order confirmation screen displays:



This screen displays only if payment is handled externally. For field value descriptions, see [Table 3–2, "Return Order With Exchange Order Slip Screen"](#).

Table 3–2 Return Order With Exchange Order Slip Screen

Field	Description
Print and Close	Choose this button to save any notes to the order, print the order, and close the order tab.
Cancel Order	Choose this button to cancel the order.

3.7 Performing Alert and Queue Management Tasks

The Alert Management task enables you to create, resolve, and assign alerts to users. Typically, alerts are either raised by the system or manually created. The alert can be assigned to specific users or queues. The Alert and Queue Management task also provides an alert statistics report. This report provides visibility to alerts that are assigned to a specific user or queue. For more information about performing alert tasks, see [Section 2.6, "Performing Alert and Queue Management Tasks"](#).

3.8 User Security

This section describes how to establish and manage store users. The users can change their password, when needed. The store users can belong to multiple user groups. A user who belongs to multiple user groups retains the least restrictive set of permission defined by the groups to which the user belongs.

The store administrator can change the credentials of the store users such as the user groups, user activation, and deactivation. The store administrator can also transfer a user from one store to another.

3.8.1 Changing Passwords

You can change your password in this screen.

To change your password:

1. From Tasks > User Security, select Change Password. The Change Password screen displays.
2. In Old Password, enter your old password.
3. In New Password, enter a new password.
4. In Confirm Password, enter your new password again for confirmation.
5. Click Confirm.

Note: Passwords are case sensitive, and can be any combination of printable characters.

3.8.2 Managing Users

This section explains how to modify credentials of the selected user.

Store administrators can search for users, change user credentials, or transfer users to another store. The Sterling Customer Order Management PCA does not allow users to modify their own credentials.

3.8.2.1 Searching for Users

You can search for a user and modify their credentials.

To search for a user:

1. From Tasks > User Security, select Manage Users. The Manage Users screen displays.
2. In the Search Users panel:
 - a. In Store, the store name displays.
 - b. In User ID, enter the identifier of the user. You can either enter the complete identifier or a part of the identifier.
 - c. In User Name, enter the name of the user whose status or group needs to be changed.

Note: Both User ID and User Name are case sensitive.



- d. In Status:
 - Choose Active, if the user is currently an active user.
 - Choose Inactive, if the user is currently an inactive user.
3. Click Search.
 - If only one user is found as a result of your search criteria, the Modifying User Details screen displays. For more information about modifying user credentials, see [Section 3.8.2.2, "Modifying User Credentials"](#).
 - If multiple users are found as a result of your search criteria, the search results display in the Search Result panel. You can view the user identifier, user name, and store details. Select the User ID whose credentials you want to modify and click Proceed.

3.8.2.2 Modifying User Credentials

The store administrator can modify credentials for the selected user and also assign user groups.

In the User Detail panel, you can view the identifier of the user, user name, store details, and the current status of the user.


To change user credentials:

1. In the Change User Credentials panel:
 - Choose Activate to activate the user.
 - Click Deactivate to deactivate the user.
2. In the Assign User Groups panel:
 - To subscribe the user to a user group, select the user group and click .
 - To unsubscribe the user from a user group, select the user group and click .
3. Click Confirm.

3.8.2.3 Transferring Users to a Store

You can transfer the selected user to another store.

To transfer the selected user to another store:

1. From Tasks > User Security, select Transfer Store. The Transfer Store screen displays.
2. In Transfer <name_of_the_user> to Store, enter the store name. If you want to search for a store, click . For more information about searching a store, see [Section 3.8.2.3.1, "Searching for a Store"](#).
3. Click Confirm.

3.8.2.3.1 Searching for a Store

You can search for different stores to transfer the users.

To search for a store:

1. In Store #, enter the store number, if applicable.
2. In Store Name, enter the complete store name or a part of the store name, if applicable.

3. In City, enter the complete city name or a part of the city name, if applicable.
4. In State, enter the complete state name or a part of the state name, if applicable.

Note: The Store Name, City, and State are case sensitive.

For example, if you enter the state as California, all stores available in California display in the Search Results panel.

5. In Max Records, enter the maximum number of records to be listed as a result of your search.
By default, the value entered is 30.
6. Click Search. The search results display in the Search Result panel.
7. From the Store List panel, select the store to which you want to transfer the user.
8. Click Proceed.

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