**Sterling Commerce**
*An IBM Company*

# Sterling Call Center and Store

## Release Notes

Release 8.0

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# Contents

## 2 Known Issues

# Preface

This document introduces the new features of Sterling Call Center and Store<sup>TM</sup>, Release 8.0. It also discusses the known issues in this release and how to resolve them, wherever possible.

## Intended Audience

This document is intended for use by system administrators and managers who need to configure Sterling Call Center and Store to meet their business requirements.

## Structure

This document contains the following sections:

### Chapter 1, "New Features"

This chapter introduces the new features in Sterling Call Center and Store, Release 8.0.

### Chapter 2, "Known Issues"

This chapter provides a list of the known issues in Release 8.0 of the Sterling Call Center and Store applications.

## Documentation

For more information about the Sterling Call Center and Store components, see the following manuals:

- *Sterling Call Center and Store Release Notes*

- *Sterling Call Center and Store Installation Guide*

- *Sterling Call Center and Store Concepts*

- *Sterling Call Center and Store Implementation Guide*

- *Sterling Call Center and Store User Guide*

- *Sterling Call Center and Store Upgrade Guide*

- *Sterling Call Center and Store Analytics Guide*

- *Sterling Call Center and Store Javadocs*

For more information about the Sterling Multi-Channel Fulfillment Solution® components, see the following manuals:

- *Sterling Multi-Channel Fulfillment Solution™ Release Notes*

- *Sterling Selling and Fulfillment Suite™ Release Notes*

- *Sterling Multi-Channel Fulfillment Solution Installation Guide*

- *Sterling Multi-Channel Fulfillment Solution Upgrade Guide*

- *Sterling Multi-Channel Fulfillment Solution Configuration Deployment Tool Guide*

- *Sterling Multi-Channel Fulfillment Solution Performance Management Guide*

- *Sterling Multi-Channel Fulfillment Solution High Availability Guide*

- *Sterling Multi-Channel Fulfillment Solution System Management Guide*

- *Sterling Multi-Channel Fulfillment Solution Localization Guide*

- *Sterling Multi-Channel Fulfillment Solution Customization Guide*

- *Sterling Multi-Channel Fulfillment Solution Integration Guide*

- *Sterling Selling and Fulfillment Suite Integration Guide*

- *Sterling Multi-Channel Fulfillment Solution Product Concepts*

- *Sterling Warehouse Management™ System Concepts Guide*

- *Sterling Multi-Channel Fulfillment Solution Platform Configuration Guide*

- *Sterling Distributed Order Management™ Configuration Guide*

- *Sterling Supply Collaboration Configuration Guide*
- *Sterling Global Inventory Visibility*<sup>TM</sup> *Configuration Guide*
- *Sterling Product Management*<sup>TM</sup> *Configuration Guide*
- *Sterling Logistics Management Configuration Guide*
- *Sterling Reverse Logistics*<sup>TM</sup> *Configuration Guide*
- *Sterling Warehouse Management System Configuration Guide*
- *Sterling Multi-Channel Fulfillment Solution Platform User Guide*
- *Sterling Distributed Order Management User Guide*
- *Sterling Supply Collaboration User Guide*
- *Sterling Global Inventory Visibility User Guide*
- *Sterling Logistics Management User Guide*
- *Sterling Reverse Logistics User Guide*
- *Sterling Warehouse Management System User Guide*
- *Sterling Multi-Channel Fulfillment Mobile Application User Guide*
- *Sterling Multi-Channel Fulfillment Solution Analytics*<sup>TM</sup> *Guide*
- *Sterling Multi-Channel Fulfillment Solution Javadocs*
- *Sterling Multi-Channel Fulfillment Solution Glossary*
- *Sterling Parcel Carrier Adapter Guide*

For a description of the various documents in the Sterling Call Center and Store documentation set, see the Sterling Call Center and Store documentation home page at:

`<INSTALL_DIR>/documentation/YCD_doc_home.html`

`<INSTALL_DIR>` is the directory where Sterling Call Center and Store and the Sterling Multi-Channel Fulfillment Solution are installed.

# Conventions

The following conventions may be used in this manual:

| Convention | Meaning |
| --- | --- |
| . . . | Ellipsis represents information that has been omitted. |

| Convention | Meaning |
|---|---|
| **< >** | 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. |
| <INSTALL_DIR> | User-supplied location of the Sterling Multi-Channel Fulfillment Solution installation directory and Sterling Call Center and Store installation directory. This is only applicable for Release 8.0. |
| <YANTRA_HOME_OLD> | User-supplied location of the Sterling Supply Chain Applications installation directory and Sterling Customer Order Management PCA for previously installed releases. This is only applicable for Sterling Supply Chain Applications Releases 7.7, 7.9, and 7.11. |
| <YFS_HOME_OLD> | This is the `<YANTRA_HOME>/Runtime` directory of previously installed releases. This is only applicable for Sterling Supply Chain Applications Releases 7.7, 7.9, and 7.11. |
| <ANALYTICS_HOME> | User-supplied location of the Sterling Call Center and Store Analytics installation directory.<br><br>**Note:** This convention is used only in the *Sterling Call Center and Store Analytics Guide*. |
| <COGNOS_HOME> | User-supplied location of the Cognos installation directory.<br><br>**Note:** This convention is used only in the *Sterling Call Center and Store Analytics Guide*. |

**Notes:** The Sterling Call Center and Store documentation set uses the following conventions in the context of the product name:

- Sterling Customer Order Management PCA is used for Release 7.5 and earlier

- Sterling Call Center and Store is used for Release 8.0

The Sterling Multi-Channel Fulfillment Solution documentation set uses the following conventions in the context of the product name:

- Sterling Supply Chain Applications is used for Releases 7.9 and 7.11

- Sterling Multi-Channel Fulfillment Solution is used for Release 8.0

# 1

# New Features

This chapter describes the new concepts and functionalities introduced in Sterling Call Center and Store, Release 8.0, for both the Sterling Call Center and Sterling Store applications:

- Product Name Changes in Release 8.0

- Order-Related Tasks

- Return Enhancements

- Integrating with the Sterling Multi-Channel Selling Solution

- Customer Tasks

- In-Store Pickup Tasks

- Price Match-Related Tasks

- Delivery and Provided Services Enhancements

- Other Enhancements

## 1.1 Product Name Changes in Release 8.0

Product names have changed in Release 8.0, as shown in Table 1–1.

*Table 1–1   Product Name Changes*

| Old Product Name | New Product Name |
|---|---|
| Sterling Supply Chain Applications | Sterling Multi-Channel Fulfillment Solution |
| Sterling Customer Order Management PCA | Sterling Call Center and Store |

Document titles have changed in Release 8.0, as shown in Table 1–2.

*Table 1–2   Document Title Changes*

| Old Book Name | New Book Name |
|---|---|
| Sterling Customer Order Management PCA Release Notes | Sterling Call Center and Store Release Notes |
| Sterling Customer Order Management PCA Installation Guide | Sterling Call Center and Store Installation Guide |
| Sterling Customer Order Management PCA Concepts Guide | Sterling Call Center and Store Concepts Guide |
| Sterling Customer Order Management PCA Implementation Guide | Sterling Call Center and Store Implementation Guide |
| Sterling Customer Order Management PCA User Guide | Sterling Call Center and Store User Guide |
| Sterling Customer Order Management PCA Upgrade Guide | Sterling Call Center and Store Upgrade Guide |

**Important:**  As part of Release 8.0, a new book, *Sterling Call Center and Store Analytics Guide* has been created.

## 1.2 Order-Related Tasks

The following order-related tasks have been added in Sterling Call Center and Store, Release 8.0:

- Stylized Items
- Stop Delivery Request
- Order History Notes
- Large Order Item Entry
- Charge-Related Enhancements
- Inventory Check for Cross-Sell Items
- Custom Credit Card Validation
- View Procurement Orders
- Enhanced Shipment Tracking

### 1.2.1 Stylized Items

Sterling Call Center and Store, Release 8.0, introduces support for stylized items. A model item is an item that can be used to represent a group of items, all of which have a similar characteristic, such as size or color. These items can be created with multiple child items (stylized items). Stylized items can be added to an order using the new style selector user interface.

### 1.2.2 Stop Delivery Request

Sterling Call Center and Store, Release 8.0, introduces the functionality under which an item can be stopped from being delivered or shipped to the customer even after it has reached a status that cannot be cancelled. (Earlier, when an order was shipped, there was no way to stop it from being delivered after it reached a status that cannot be cancelled.)

### 1.2.3 Order History Notes

In Sterling Call Center and Store, Release 8.0, enhancements have been made to enable the configuration of which order events should automatically log an order note that will appear on the Notes screen. Also, some enhancements have been made to the Notes screen to facilitate better filtering and viewing of appropriate notes. This functionality reduces the call handling time and ensures that the Cusotomer Service Representative (CSR) provides better customer service.

### 1.2.4 Large Order Item Entry

Sterling Call Center and Store, Release 8.0, provides a Large Order Item Entry screen, which is designed to handle a large number of order lines. In this screen, the order lines are displayed in a table. On selecting an order line, the details of the order line are displayed in the preview panel.

### 1.2.5 Charge-Related Enhancements

Sterling Call Center and Store, Release 8.0, introduces the ability to add charges in addition to viewing and modifying charges.

### 1.2.6 Inventory Check for Cross-Sell Items

In Sterling Call Center and Store, Release 8.0, a new configuration of inventory checks for cross-sell items is provided. During the order entry process, you can change the configuration to either display or not display items based on their availability when viewing the related items of an item that are already on the order.

### 1.2.7 Custom Credit Card Validation

In Sterling Call Center and Store, Release 8.0, enhancements have been made to allow for custom credit card validation logic for those credit cards that cannot be validated using the standard Luhn's algorithm.

### 1.2.8 View Procurement Orders

Sterling Call Center and Store, Release 8.0, introduces the functionality to enable users to view procurement orders (Purchase Orders and Transfer Orders) that are created for a sales order.

### 1.2.9 Enhanced Shipment Tracking

In Sterling Call Center and Store, Release 8.0, the getCompleteShipmentDetails API has been introduced to improve the performance of the Shipment Tracking screen.

## 1.3 Return Enhancements

The following new features or functionalities have been added to the return-related tasks:

- Create Return Order
- Return Order Search and Summary
- Cancel Return Order
- Change an Appointment, Return Method, and Address
- Issue Refund Now
- Create Exchange Order
- Return Wrongly Shipped Items

### 1.3.1 Create Return Order

In Sterling Call Center and Store, Release 8.0, the Initiate Return and Create Store Return tasks have been replaced by the Create Return Order task, which enables the user to create a return order for many return scenarios, including call center returns, in-store returns, blind returns, returns for wrongly shipped items, and returns for extra items shipped. Return orders can also be created based on the container, because a customer may want to return an unopened or damaged package or shipment container.

### 1.3.2 Return Order Search and Summary

Sterling Call Center and Store, Release 8.0, provides the Return Search task that enables a user to search for a return order and view the summary of a return order.

### 1.3.3 Cancel Return Order

Sterling Call Center and Store, Release 8.0, provides the ability to cancel the return order lines and exchange order lines.

### 1.3.4 Change an Appointment, Return Method, and Address

Sterling Call Center and Store, Release 8.0, introduces the ability to change the service appointment, return method (Delivery/Pickup), and address for a return order.

### 1.3.5 Issue Refund Now

Sterling Call Center and Store, Release 8.0, introduces the ability to immediately issue a refund from a return to a customer.

### 1.3.6 Create Exchange Order

Sterling Call Center and Store, Release 8.0, introduces the functionality of creating an exchange order for a return order even after the return has been completely created.

### 1.3.7 Return Wrongly Shipped Items

Sterling Call Center and Store, Release 8.0, introduces the functionality of returning items that have been wrongly shipped to customers, such as extra items, wrong items, and unexpected items.

## 1.4 Integrating with the Sterling Multi-Channel Selling Solution

In Sterling Call Center and Store, Release 8.0, the following new tasks have been introduced as part of integrating with the Sterling Multi-Channel Selling Solution:

- User Interface Integration with Automatic Login
- Item Search and Entitlement
- Pricing Integration
- Coupon Validation
- Configured Items

### 1.4.1 User Interface Integration with Automatic Login

Sterling Call Center and Store, Release 8.0, introduces the ability to automatically log in to the Sterling Multi-Channel Selling Solution using the Sterling Call Center and Store session credentials. It also provides the functionality to view carts, quotes, templates, gift registries and wish lists created in the Sterling Multi-Channel Selling Solution.

### 1.4.2 Item Search and Entitlement

When running the Sterling Call Center and Store, Release 8.0, in an integrated mode, the Item Search screens will be replaced by the Item Search screens from the Sterling Multi-Channel Selling Solution. This allows a user to use the catalog and item browsing functionality.

Additionally, an implementation of the YCDGetItemListUE has been provided, which retrieves the list of items that a user is entitled to view.

### 1.4.3 Pricing Integration

Sterling Call Center and Store, Release 8.0, provides implementations of the orderRepricingUE user exit and getExternalPricesForItemListUE user exit to retrieve pricing information from the Sterling Multi-Channel Selling Solution pricing engine.

### 1.4.4 Coupon Validation

In Sterling Call Center and Store, Release 8.0, the YCDPromotionValidationUE user exit has been enhanced to integrate with the CouponValidation API provided by the Sterling Multi-Channel Selling Solution for validating of coupons and promotions.

### 1.4.5 Configured Items

Sterling Call Center and Store, Release 8.0, introduces support for configured items. A configured item is a group of items that are related, such as a computer, which comprises the processor, keyboard, mouse, and monitor. The Sterling Multi-Channel Selling Solution Item Configuration user interface is integrated into the Sterling Call Center and Store Order Entry and Order Maintenance screens.

Sterling Call Center and Store also provides the functionality to reconfigure the items.

## 1.5 Customer Tasks

In Sterling Call Center and Store, Release 8.0, the following customer-related tasks have been introduced:

- Customer Setup
- Account Assignment/Management
- Customer Context Ordering
- Customer Search

### 1.5.1 Customer Setup

Sterling Call Center and Store, Release 8.0, provides the functionality to create, manage, and view customers, customer contacts, addresses, and payment methods.

### 1.5.2 Account Assignment/Management

Sterling Call Center and Store, Release 8.0, introduces the functionality to assign certain customers to CSR, based on the team they are members of. As a result, the CSRs are granted access only to the orders placed by the customers they are assigned to manage.

### 1.5.3 Customer Context Ordering

Sterling Call Center and Store, Release 8.0, provides the functionality to place orders and perform order modifications based on customer context, for better customer service.

### 1.5.4 Customer Search

Sterling Call Center and Store, Release 8.0, provides the functionality to search and retrieve customer records and view the customer details.

## 1.6 In-Store Pickup Tasks

In Sterling Store, Release 8.0, the following tasks have been introduced to manage the Store pickup tasks:

- Advanced Shipment Search
- Customer Pick
- Backroom Pick
- Print Pick Ticket
- Undo Backroom Pick

### 1.6.1 Advanced Shipment Search

This task enables a Store Associate to search for shipments that need to be picked.

### 1.6.2 Customer Pick

This task enables a Store Associate to record a customer pick when the customer arrives at the store and picks up the items they ordered.

### 1.6.3 Backroom Pick

This task enables a Store Associate to move the inventory from the backroom pick area to the customer pick area. This task reduces the item retrieval time for the customers.

### 1.6.4 Print Pick Ticket

This task provides the functionality to print a pick ticket with details of the items to be picked from the backroom area to the customer pick area.

### 1.6.5 Undo Backroom Pick

This task enables a Store Associate to undo a backroom pick if the inventory needs to be moved back to the backroom pick area.

## 1.7 Price Match-Related Tasks

The following new features or functionalities have been added to price match-related tasks:

- Price Match Enhancements
- Purging of Price Match Records

### 1.7.1 Price Match Enhancements

In Sterling Call Center and Store, Release 8.0, enhancements have been made to create and manage competitors and create and manage price match records. Also, the process of performing a price match has been enhanced.

### 1.7.2 Purging of Price Match Records

Sterling Call Center and Store, Release 8.0, includes the functionality to support the purging of price match records. This prevents the table from growing to an unmanageable size.

# 1.8 Delivery and Provided Services Enhancements

The following new features or functionalities have been added to service-related tasks:

- Delivery Services
- Provided Services

## 1.8.1 Delivery Services

In Sterling Call Center and Store, Release 8.0, enhancements have been made to extend the existing delivery services feature.

- In earlier releases, there was no provision to increase the line quantity for delivery lines. In Release 8.0, users can increase the line quantity for delivery lines.

- In earlier releases, there was no provision to reserve inventory while increasing the line quantity. In Release 8.0, enhancements have been made to reserve the inventory while increasing the line quantity.

- In earlier releases, there was no provision to mark delivery lines as gifts. In Release 8.0, users can mark delivery lines as gifts.

## 1.8.2 Provided Services

In Sterling Call Center and Store, Release 8.0, enhancements have been made to extend the existing provided services feature.

- In earlier releases, there was no provision to increase the line quantity for the provided service lines. In Release 8.0, users can increase the line quantity for the provided service lines.

- In earlier releases, the related provided services were not in the Related Items panel when the configuration rule controlling how the related items are displayed in order entry is set to display the related items in a panel at the bottom of the Item Entry screen. In Release 8.0, enhancements have been made to display the provided service items when the related items are displayed as a panel.

# 1.9 Other Enhancements

In Sterling Call Center and Store, Release 8.0, the following tasks have been introduced:

- User Preferences
- Pagination
- Reports
- Helpful Text Messages
- Sterling Multi-Channel Fulfillment Solution Console Integration

## 1.9.1 User Preferences

Sterling Call Center and Store, Release 8.0, provides the functionality to save user preferences to control various aspects of the Sterling Call Center and Store user interface, including alert notifications, additional help messages, keyboard shortcuts, and screen orientation.

## 1.9.2 Pagination

Sterling Call Center and Store, Release 8.0, introduces the ability to retrieve a large number of records one page at a time from the database.

## 1.9.3 Reports

The following reports have been added to the analytics functionality in Sterling Call Center and Store, Release 8.0:

- Cross Sell Report - This report provides information about the cross sales performance of a call center or store.
- CSR Report - This report provides information about the number of sales completed and the revenue generated by a particular CSR or store associate.
- Price Match Report - This report provides information about the items that are frequently price matched.

### 1.9.4 Helpful Text Messages

Sterling Call Center and Store, Release 8.0, introduces the functionality to display additional helpful text messages to assist new users to learn the application quickly.

### 1.9.5 Sterling Multi-Channel Fulfillment Solution Console Integration

In Sterling Call Center and Store, Release 8.0, enhancements have been made to support embedding the Sterling Multi-Channel Fulfillment Solution Console in the Sterling Call Center and Store user interface.

This enables users to demonstrate the flow of the order created and fulfilled in Sterling Call Center and Store.

# 2

# Known Issues

The following sections in this chapter describe the known issues that you may encounter in Sterling Call Center and Store, Release 8.0:

- Installation Issues
- Alternate Item Identifiers
- Alternate UOM
- Configured Items
- Style Size pop-up
- Item Search Task
- Order Entry Task
- Large Order Entry
- Order Summary
- Cancel Order Task
- Alternate Store Search
- Fulfillment Summary
- Track an Item Task
- Change Service Appointment Task
- Add Lines to Order Task
- Price Match Task
- Customer Tasks
- Return Tasks

- Integrating with Sterling Multi-Channel Selling Solution
- In-Store Pickup Tasks
- Alert-Related Tasks
- Localization
- General
- Reports

## 2.1 Installation Issues

You may encounter the following issues when installing Sterling Call Center and Store:

- **102349** - Installation of Sterling Call Center and Store factory defaults and reference implementation may fail on HP UNIX RISC environment because of "runtime" system/environment variable.

  **Solution/Workaround:** Modify the following Sterling Call Center and Store factory defaults and reference implementation files to change the "runtime" ant property and references to "runtime" to any unused keyword.

- `<INSTALL_DIR>/bin/ycd_load_defaults.xml`
- `<INSTALL_DIR>/bin/ycd_load_reference_implementation.xml`
- `<INSTALL_DIR>/bin/ycd_som_load_defaults.xml`
- `<INSTALL_DIR>/bin/ycd_som_load_reference_implementation.xml`
- **102358** - When installing Sterling Call Center and Store factory defaults and reference implementation, the OutOfMemory/MaxPermSize error is thrown on HP UNIX Itanium environment.

  **Solution/Workaround:** Change the following Sterling Call Center and Store factory defaults and reference implementation files to pass MaxPermSize as 1024m to all forked java processes.

- `<INSTALL_DIR>/bin/ycd_load_defaults.xml`
- `<INSTALL_DIR>/bin/ycd_load_reference_implementation.xml`
- `<INSTALL_DIR>/bin/ycd_som_load_defaults.xml`

- <INSTALL_DIR>/bin/ycd_som_load_reference_implementation.xml

  For example,

  ```
  <java fork="true"
  classname="com.sterlingcommerce.woodstock.noapp.NoAppLoader
  " classpathref="bootstrap.class.path">

      ....

      <jvmarg line="-XX:MaxPermSize=1024m"/>

  </java>
  ```

## 2.2 Alternate Item Identifiers

You may encounter the following issue with alternate item identifiers:

- **95744** - If you have configured alternate item identifiers to be displayed in the user interface, the same is not used in the note texts of the notes; the note texts displays only item ID's.

  **Solution/Workaround:** None.

## 2.3 Alternate UOM

You may encounter the following issues with alternate UOMs:

- **97505** - When creating a blind return or a return for an extraneous item, you cannot specify the alternate unit of measure for the items. The quantity for these return items can be specified only in the inventory unit of measure.

  **Solution/Workaround:** None.

- **97636** - If you have configured alternate ordering units of measure when creating an order, the inventory availability and price will not be displayed on the Add Items screen if an alternate unit of measure is used.

  **Solution/Workaround:** None.

## 2.4 Configured Items

You may encounter the following issues with configured items or bundles:

- **97152, 100742, 101473, 101490, 101527** - Components are not sorted under the bundle parent line in the Invoice Details screen, Delivery Fulfillment Summary screen, Change Service Appointment screen, Shipment Details screen, and order prints.

  **Solution/Workaround:** None.

- **101526** - In Sterling Store, the Fulfillment Summary screen does not display the Override Availability icon for bundle parent lines that are marked as Ship Together if the ordered quantity is not available.

  **Solution/Workaround:** None.

- **100550** - If Federal Trade Commission Compliance (FTC) rules are configured, the Track an Item task incorrectly displays the Promised Date for the bundle parent item based on the Default First Promise Date that is configured. However, the components of the bundle display the correct Promised Date.

  **Solution/Workaround:** Ignore the Promised Date for the bundle parent.

- **101973** - When the level of service for a Ship Together bundle marked for Shipping is modified on the Change Fulfillment Options screen or the Fulfillment Summary screen, the expected date is not modified in the components of the bundle. However, the expected date is modified correctly for the bundle parent item.

  **Solution/Workaround:** None.

## 2.5 Style Size pop-up

You may encounter the following issues with the Style size pop-up window.

- **97325** - The list view of the style size pop-up window does not provide a visual indication if the user selects a combination of attributes that are invalid.

  **Solution/Workaround:** Configure the button view for the style size pop-up window.

- **102119** - If you have configured availability checks to be performed for the items being added to an order, the list view of the style size pop-up window will not disable the unavailable styles until you select at least one style.

  **Solution/Workaround:** Select one style. The unavailable styles will be disabled when you do this.

- **102193** - In Sterling Call Center, if you have configured availability checks to be performed for items being added to the order and if a store is selected on the Style Items pop-up window, the selected store is not populated in the Add Items screen.

  **Solution/Workaround:** The user can select the store from the "Choose Stores" link of the Add Items screen.

- **102226** - If you have configured availability checks to be performed for the items being added to an order, when you click the Add to Order button on the style size pop-up window before the availability details for the items are retrieved, the Large Order Entry screen displays an hour glass cursor and does not add the stylized item to the order.

  **Solution/Workaround:** Wait for the availability information to be retireived on the style size pop-up window before clicking the Add to Order button.

## 2.6 Item Search Task

You may encounter the following issues when performing this task:

- **86728** - If you configure the zip code range for regions, enter a zip code in the Service Item Details screen, and search for availability, the message "This location is serviceable" is displayed when the zip code that is entered does not fall within any defined ranges.

  **Solution/Workaround:** None.

- **96767** - When searching for items in the Advanced Item Search screen by entering the item alias value instead of iIem ID, the search does not fetch the correct results.

  **Solution/Workaround:** None.

# 2.7 Order Entry Task

You may encounter the following issues when performing this task:

- **102241** - When creating an order, if you enter a partial Item ID, look up items and add them from the Item Search screen, the selected items are added as a new line and the original line with the partial Item ID is still displayed.

- **Solution/Workaround:** Delete the line with partial Item ID and click Next to save the changes.

- **87569** - In the Add Item screen, if you change the fulfillment method of a line from "Delivery" to "Pickup" or "Ship" and there is an existing work order for that line, when you click the Next button, the error message "Cannot Change Delivery Method" is displayed.

  **Solution/Workaround:** Use the Change Fulfillment Options screen to change the delivery method.

- **88301** - If your implementation of the com.yantra.yfs.japi.ue.YFSGetTagListForOrderingUE user exit does not return price attributes, the Add Item screen automatically sets the value of the IsPriceLocked attribute to "Y", thus locking the price of an order line.

  **Solution/Workaround:** Return the price in your implementation of the com.yantra.yfs.japi.ue.YFSGetTagListForOrderingUE user exit.

- **88561 -** In the Change Fulfillment Options screen, after modifying the address of the provided service item, if you click the Next button and navigate back to the Change Fulfillment Options screen, the system warns you that the location is not serviceable.

  **Solution/Workaround:** Confirm the appointment in the Change Delivery Appointment screen by clicking the Next button. Now, navigate back to the Change Fulfillment Options screen. The location becomes serviceable.

- **88649 -** When you create an order with one line, for which the ordered quantity is exactly the same quantity that is available for the selected fulfillment option, the entire quantity is reserved appropriately in the Fulfillment Summary screen. However, if you navigate back to the Change Fulfillment Options screen and change the fulfillment option of the line that consumes the same supply, the

changed fulfillment option is unavailable since the quantity is already reserved.

**Solution/Workaround:** Cancel the original line to free the reservation, add the same item as a new order line to the order, and select the appropriate fulfillment option for the new order line.

- **96467** - If you have configured the application to display the related items as a panel and to perform availability checks for the related items, the Related Items panel does not recalculate availability when the quantity for the parent item is changed.

  **Solution/Workaround:** Place the cursor on another line and again on the parent line. The Related Items panel will display the correct availability when the cursor is placed again on the parent line.

- **102191** - The Add Items page of the Order Entry task does not display a correct order total when you delete an existing line and add a new line.

  **Solution/Workaround:** The line totals can be manually added.

## 2.8 Large Order Entry

You may encounter the following issues with the Large Order Entry screen:

- **99684** - If you have configured the application such that availability checks are performed for the items being added to the order, and if the configurable bundle items defined in the Sterling Multi-Channel Selling Solution are added to the Large Order Entry screen, the preview panel at the bottom of the Large Order Entry screen displays Unknown availability for the Pick, Ship, and Delivery radio buttons.

  **Solution/Workaround 1:** The user can view the availability for the configurable bundle items on the Fulfillment Summary Screen.

  **Solution/Workaround 2:** Configure the Order Entry Rules to display the Add Items screen.

- **101461** - If you add an item to the order using the Add Lines to Order task, navigate to the next screen, and return to the Add Items screen, you cannot change the fulfillment method, quantity, or override price for the newly added lines.

**Solution/Workaround:** Use the Change Fulfillment Options task to change the fulfillment options for the line. Use the Increase Line Quantity task to increase the quantity.

- **101477** - When creating an order, the Large Order Entry screen does not support the addition of items with alternate UOMs.

  **Solution/Workaround:** None.

- **101499** - If you have configured the application to display the related items as a panel and to perform availability checks for related items, the Related Items panel on the Large Order Entry screen displays a message "Store Not Selected", even if the store is selected for the corresponding parent line.

  **Solution/Workaround:** Configure the display of related items as a pop-up window.

- **101679** - If you have configured the application to display the related items as a panel and to perform availability checks for related items, the Large Order Entry screen displays an "Invalid Organization Code" message when you add an item for which associated items are not configured.

  **Solution/Workaround:** Configure the Order Entry Rules to "Never display large order entry screen".

- **101681** -  In Sterling Call Center and Store Configurator, when configuring Order Entry Rules, if you have configure the application to display the Large Order Entry Screen, and if you navigate forward and backward between screens and change the configuration to display the Add Items screen, the Order Entry Rules Summary screen does not display the configuration for displaying the Add Items screen.

  **Solution/Workaround:** Ensure that you do not click the Previous button while changing the configuration for displaying Add Items screen in the Order Entry Rules.

- **101682** - When Shipping and Delivery are configured to be displayed as a single option on the Large Order Entry screen, the delivery method is not correctly defaulted when the item being added has Shipping Allowed = "M" and DeliveryAllowed = "Y", where M = "Only If Something Else Is Being Delivered" and Y = "Yes".

**Solution/Workaround:** The user can change the delivery method for the item by selecting the appropriate radio button.

- **101748** - If bundle items that are not preconfigured are added to the Large Order Entry screen, the message "java.lang.NullPointerException" is displayed when you try to select a store for the item.

  **Solution/Workaround:** The user can select the store for the item on the Change Fulfillment Options screen, after reconfiguring the item.

- **101750** - If bundle items that are not preconfigured are added to the Large Order Entry screen, an incorrect unit price is displayed for the item.

  **Solution/Workaround:** The user can view the correct unit price for the item after configuring the item.

- **101955** - In the Add Lines to Order task, if you add a line on the Large Order Entry screen, navigate forward, return to the Large Order Entry screen, and delete the newly added line, the line does not get deleted from the order.

  **Solution/Workaround:** Use the Cancel Order task to delete the line.

- **101966** - If you look up item styles by clicking Add to Order on Advanced Item Search screen and if you close the pop-up without actually clicking the Add to Order button, the Large Order Entry screen displays a CSR message "The items () have been added to the order" even though no items are added to the order.

  **Solution/Workaround:** Ignore the CSR message.

## 2.9 Order Summary

You may encounter the following issue when performing this task:

- **101823** - In the Order Notes pop-up window for a sales order, order line, or a return order, if an order note has some carriage returns in the note text:

  - The note is displayed with the Expand/Collapse hyperlink irrespective of the total number of characters in the note text.

  – When displaying the note text, a new line is added for each
    carriage return.

  **Solution/Workaround:** None.

## 2.10 Cancel Order Task

You may encounter the following issues when performing this task:

- **88486** - If you create an order with order lines and configure them
  as follows:

  – Delivery is allowed for some of the items.

  – Delivery is allowed for the remaining items only if the order
    contains other delivery items.

  When you cancel the first set of items, the system does not issue a
  warning that the remaining items cannot be delivered independently.

  **Solution/Workaround:** Change the fulfillment options of the
  remaining order lines using the change fulfillment options task.

- **96136** - The Important Events tab of the Line Summary screen does
  not display the cancellation reason for the lines cancelled using the
  Cancel Order task when in the `Included in Shipment` status.

  **Solution/Workaround:** None.

## 2.11 Alternate Store Search

You may encounter the following issues when performing this task:

- **87953** - If an order has multiple order lines that contain the same
  item and the availability is such that you cannot fulfill all the lines
  from one store, when you select all the order lines to view the
  availability, the availability information pertaining to only the first
  order line is displayed.

  **Solution/Workaround:** In the Change Fulfillment Options screen,
  select individual lines one at a time to view the availability
  information.

- **88022** - In the Alternate Stores pop-up window, when you enter an
  invalid city along with a valid zip code and click the Search button,

the result displays all stores in the Search Results panel irrespective of the city or zip code entered.

**Solution/Workaround:** None.

## 2.12 Fulfillment Summary

You may encounter the following issue when performing this task:

- **87887** - In the Fulfillment Summary screen, when you right-click a table and select the "Filter" option, only the Item ID field is displayed in the Filter Criteria pop-up window.

  **Solution/Workaround:** None.

## 2.13 Track an Item Task

You may encounter the following issue when performing this task:

- **101822** - The getCompleteShipmentDetails API throws a NullPointerException if the "OrderLines" element is not present in the output template.

  **Solution/Workaround:** Ensure that the template of getCompleteShipmentDetails API contains the "OrderLines" element under the "Order" element.

## 2.14 Change Service Appointment Task

You may encounter the following issue when performing this task:

- **98399** - When you add a new line to an order and take an appointment for the new line, such that the new line is added to an already existing work order, the capacity information for the slot does not indicate the new capacity that has just been consumed by the addition of the new line.

  **Solution/Workaround:** None.

## 2.15 Add Lines to Order Task

You may encounter the following issue when performing this task in Sterling Store:

- **82750** - When you add an item that has many related items, the panel that displays the related items at the bottom of the same screen does not have a horizontal scroll bar.

  **Solution/Workaround:** Configure the order entry rules in the Sterling Call Center and Store Configurator to display the related items in a pop-up window.

- **84641** - When you create an order with many related lines, the order lines are not sorted in the Order Summary screen if the relationship types are not defined for the enterprise.

  **Solution/Workaround:** The enterprise for which orders are created must have its own relationship types defined and not inherit them from any other organization.

## 2.16 Price Match Task

You may encounter the following issues when performing this task:

- **96887** - When you try to approve or deny a price match from the Alert Details screen, the hot keys for the Approve or Deny buttons do not work.

  **Solution/Workaround:** Click either the Approve button or Deny button to approve or deny the price match respectively.

## 2.17 Customer Tasks

You may encounter the following issues when performing customer tasks:

- **101631** - In the Business Customer Details screen, the Return History tab does not populate the return orders for the customer.

  **Solution/Workaround:** You can use the Advanced Return Search task to search for return orders for a customer.

- **101739** - In the Advanced Customer Search screen, after you select a customer, if you navigate to the next screen, return to this screen,

and select the Edit Address hyperlink, the addresses are not populated in the drop-down lists in the Edit Address pop-up window.

**Solution/Workaround:** Search for the customer again and re-select the customer from the table, this will reset the addresses and the edit list in the pop-up window.

# 2.18 Return Tasks

You may encounter the following issues when performing a return task:

*   **100687** - When you scan or enter the Item ID for a bundle component in the Return Line Selection screen in Sterling Store, the "There are no orders with this item. An order with the correct item must be added or the item should be added without the context of the order" error message is displayed.

    **Solution/Workaround:** Sterling Store currently does not support returning individual bundle components. Therefore, you must scan or enter the Item ID of the bundle parent to return the bundle. You have the option of returning the bundle component as a blind line to work around this limitation.

*   **100828** - If you add a blind or extra bundle item on the Return Line Selection screen, click Next, add a return reason, and click Next, go back to the Return Line Selection screen and remove the bundles from the order. You are allowed to proceed to the next screen without specifying any lines on the order. This causes errors to occur on the Return Reason screen because there are no valid lines on the order.

    **Solution/Workaround:** None.

*   **101006** - When Price Match is performed for any item through Return Entry flow, the "Order cannot be modified in current status" error is thrown.

    **Solution/Workaround:** Allow the "Change Other Attributes" modification type at the "Order" level for "Shipped" status.

*   **101157** - When a return is created, if an extraneous item is added with a "Customer Can Keep" rule, the corresponding item is marked as a "Credit Without Receipt" item. This does not cause an issue for processing because the price of the extraneous line is set to zero and refunds will not be processed.

**Solution/Workaround:** None.

- **101164** - During return creation, items can be marked for "Return Pickup". If there is no return delivery service associated for the return item, the system will not prompt for a pickup appointment. However, you will be allowed to proceed with the order even though there is no work order created.

  **Solution/Workaround:** Ensure that all the items specified as IsDeliveryAllowed = "Y" have a return delivery service associated with them.

- **101193** - When an exchange order is created for a return order, fulfillment method is not defaulted from the sales order lines.

  **Solution/Workaround:** Include the "DeliveryMethod" attribute as part of the template for the "Default Derived Order" for the "Order Fulfillment" and "Return Fulfillment" process types.

- **101790** - During return creation, if an extraneous item is marked for "Customer Can Keep", the line type will be set to "Credit". Later, if "Customer Can Keep" is not selected and a return method is specified, the line type will not be reset to "Extraneous".

  **Solution/Workaround:** None.

- **101922** - When viewing the notes pop-up window from the Return Summary screen, if you try to View Notes Created on Order Header, the Filter by Note Type drop-down list does not display the Note Types on the original order.

  **Solution/Workaround:** You can view all the notes on the original order. To view specific notes on the original order, open the Order Summary for the original order and Filter by Note Type.

# 2.19 Integrating with Sterling Multi-Channel Selling Solution

You may encounter the following issues when performing integration-related tasks:

- **96958** - When the Sterling Multi-Channel Selling Solution is not available, and an attempt to fetch pricing or item information is made, an exception com.yantra.yfs.japi.YFSException, "Error description not available" is thrown.

**Solution/Workaround:** None.

- **98524** - When items are synchronized from the Sterling Multi-Channel Selling Solution with kit components, the Description field in Sterling Call Center (Item Details > More Details) for the kit lines is blank.

  **Solution/Workaround:** None.

- **99987** - When adding new items from the Multi Add Line screen, the quantity and other items on the order are not taken into consideration until the Next button is clicked. Therefore, bulk discounts and promotional prices are not reflected on the order line.

  **Solution/Workaround:** After, the user clicks the Next button, the pricing engine will execute and the price will be updated correctly on the order.

- **102010** - When the Reconfigure Item task is used to reconfigure items, the component quantities are not updated correctly if you choose a quantity other than 1 for the component.

  **Solution/Workaround:** None.

- **102046** - Multiple currencies per storefront/enterprise are not supported when Sterling Call Center and Store is integrated with the Sterling Multi-Channel Selling Solution because currency determination is different between the web channel and call center/store channels.

  **Solution/Workaround:** Use one currency per storefront/enterprise when Sterling Call Center and Store is integrated with the Sterling Multi-Channel Selling Solution.

- **102064** - If you place an order from a quote when Sterling Call Center and Store is integrated with the Sterling Multi-Channel Selling Solution, the Sterling Call Center and Store will not stop you from modifying that order. This could result in violation of the terms of the quote depending on your business policy.

  **Solution/Workaround:** It is recommended not to use quotes when Sterling Call Center and Store is integrated with the Sterling Multi-Channel Selling Solution.

- **102118** -

- Manual price override of a partial quantity for an item/product is not supported. If the same item appears in the cart or draft order multiple times, you cannot manually discount or lift one line and not the other. The pricing engine is not capable of supporting different prices in the same cart or draft order for the same item.

- Prices that have been manually overridden still qualify for discounts/surcharges through pricing rules and coupons. When the freeze flag is set for a line item, the override price is stored as the unit price, and the freeze flag is set on the line item. Items that have been manually overridden still qualify for pricing rule or coupon discounts both at the line level as well as the order total level.

- Repricing items with manual price overrides may result in inaccurate prices. If you reprice items that have been manually overridden, the discounts/surcharges will not be automatically removed, even if the order no longer qualifies for the discount/surcharge. When the manually overridden line item qualifies for item discounts/surcharges, its manually overridden unit price will be adjusted accordingly and the new unit price will be stored for the order. If you re-price items that have been manually overridden more than once, the discounts/surcharges will be applied a second time, resulting in double applications of discounts/surcharges.

- CSR/sales associates cannot not see the unit price with discounts on the multi-line entry screen in Sterling Call Center and Store. On the Multi Line Entry screen of the draft order, Sterling Call Center and Store displays the price before the pricing rules and coupons are applied. On step 4, when the payment is collected, the rules/coupons are applied, and the final line price including discounts is displayed.

- Line discount details are not available in Sterling Call Center. Line discounts are displayed in the line price shown on the payment screen. A detailed breakdown of which discounts are applied is not available. A detailed breakdown is available for order total discounts.

- Manual overrides of prices are not considered in shipping discount calculation. Manual price overrides are not passed to the pricing engine. Therefore, the pricing engine uses the engine calculated

price when determining if the order total qualifies the order for shipping discounts.

— If Discount distribution is enables, it results in inconsistent display of line prices between web and Sterling Call Center and Store. If the distribute discounts business rule is enabled, the order total level discounts are distributed to the line items in Sterling Call Center and Store, but not on the web during order placement. This can result in line item prices showing differently in the channels, but the total order price will be consistent. It will also result in a discrepancy in pricing display when the order is placed on the web vs. when status is checked, because during status check the order total level discounts will be distributed to the line, but they are not distribution during order placement.

— Shipping discounts are not distributed to the line items. Shipping discounts intentionally do not adhere to the business rule to distribute discounts to line items.

**Solution/Workaround:** None.

- **102413** - When Sterling Call Center and Store is integrated with Sterling Multi-Channel Selling Solution, if an order is created or changed such that the Order Repricing user exit is invoked, the Sterling Multi-Channel Selling Solution pricing engine will return adjustments that could contain numbers with more than 2 digits after the decimal. In this case, when the order total is calculated within the createOrder/changeOrder API, the order total may be inaccurate due to incorrectly rounding off both the adjustment being applied to the order and the order total.

  **Solution/Workaround 1:** When the order repricing user exit output is produced, ensure that the charge adjustments returned by the Sterling Multi-Channel Selling Solution pricing engine are rounded off. This will prevent the createOrder/changeOrder API from having to round off the numbers produced.

  **Solution/Workaround 2:** Modify the `YCD_Order_Repricing_Output_8_0.xsl.sample` file to return rounded off values for the following attributes.

  — HeaderCharge

  — LineCharge

  — ChargeAmount

## 2.20 In-Store Pickup Tasks

You may encounter the following issue when performing the in-store pickup tasks:

- **101975** - If you do not pick any quantity in the Customer Pick task for some shipment lines and you have configured notes to be logged on shipment confirmation, the generated notes will incorrectly list those items that were not picked.

  **Solution/Workaround:** Modify the XSL file used to generate notes for the shipment confirmation event to filter out the zero quantity shipment lines.

  The `<INSTALL_DIR>/repository/xapi/template/merged/service/ycd/YCD_Log_Note_On_Confirm_Shipment_8.0.xsl.sample` file has been provided for the shipment confirmation notes.

## 2.21 Alert-Related Tasks

You may encounter the following issue when performing the alert-related tasks:

- **102291** - The Follow Up Date field on the Alert Details screen is editable even if the alert is Closed/Resolved.

  **Solution/Workaround:** None.

## 2.22 Localization

You may encounter the following issue with localization:

- **84643** - If you have localized item descriptions using the Sterling Call Center and Store Configurator, the localized descriptions are not displayed across Sterling Call Center and Store screens.

  **Solution/Workaround:** None.

- **98227** -  If you are using a locale, having the quantity format different from the quantity format of en_US_EST locale, the Choose Items screen of the customer pick flow throws a number format exception.

  **Solution/Workaround:** None.

- **101879** - If a user attempts to override the price of an order for which the currency is not USD or Euro (which are provided by default and for which the Currency Key does not equal the Currency Code), a null pointer exception is displayed.

  **Solution/Workaround:** Update the currency record in the database such that the Currency Key is equal to the Currency Code.

- **102016** - If your enterprise and users belong to fr_FR locale, while creating a return with an exchange using the Create Return task, the quantity created on the return order will not be defaulted correctly on the Create Exchange: Add Items screen.

  **Solution/Workaround:** None.

- **102020** - If the enterprise belongs to fr_FR locale, when you click Next on the Increase Line Quantity screen, an exception java.lang.NumberFormatException will be displayed in the logs.

  **Solution/Workaround:** None.

## 2.23  General

You may encounter the following issues in Sterling Call Center and Store user interfaces:

- **83361** - When both Add Multiple Lines and Order Entry editors are open, Sterling Call Center and Store client automatically exits and does not display the Login page.

  **Solution/Workaround:** Close the Add Line or Order Entry editor and log out of Sterling Call Center and Store client.

- **88087, 88348** - The radio buttons in some of the screens disappear when you press the Tab key or Alt key.

  **Solution/Workaround:** Point your cursor over the area where the radio buttons are positioned. The radio buttons reappear.

- **100914** - This version of Sterling Call Center and Store is not certified for Web Commerce integration.

  **Solution/Workaround:** You should use Sterling Customer Order Management PCA, 7.4 to facilitate Web Commerce integration.

- **101320** - The APIs/UEs/Events section of the Documnetation Home Page incorrectly lists that the attributes have been deleted from the processDuplicateOrderCheckUE template.

  **Solution/Workaround:** Ignore the deleted attributes list for the processDuplicateOrderCheckUE template.

## 2.24 Reports

You may encounter the following issues with reports:

- **100698** - The View My Reports screen does not display the list of reports when you open it the first time.

  **Solution/Workaround:** Close the editor and select the related task again.

- **100981** - In the Report Search Criteria screen for Price Match reports, if you search items by entering text in the Choose the items to view the report for field (only price matched items are chosen by default) criteria, and the items are searched taking into consideration the entered value as item's short description, the search is not executed taking into consideration the entered value as Item ID.

  **Solution/Workaround:** None.