

Retek[®] Customer Order Management[™] 11.0

User Guide

Corporate Headquarters:

Retek Inc.
Retek on the Mall
950 Nicollet Mall
Minneapolis, MN 55403
USA
888.61.RETEK (toll free US)
Switchboard:
+1 612 587 5000
Fax:
+1 612 587 5100

European Headquarters:

Retek
110 Wigmore Street
London
W1U 3RW
United Kingdom
Switchboard:
+44 (0)20 7563 4600
Sales Enquiries:
+44 (0)20 7563 46 46
Fax:
+44 (0)20 7563 46 10

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Customer Support

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Customer Support is available 7x24x365 via email, phone, and Web access.

Depending on the Support option chosen by a particular client (Standard, Plus, or Premium), the times that certain services are delivered may be restricted. Severity 1 (Critical) issues are addressed on a 7x24 basis and receive continuous attention until resolved, for all clients on active maintenance. Retek customers on active maintenance agreements may contact a global Customer Support representative in accordance with contract terms in one of the following ways.

Contact Method	Contact Information
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E-mail	support@retex.com
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Internet (ROCS)	rocs.retek.com Retek's secure client Web site to update and view issues
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Phone	+1 612 587 5800
-------	-----------------

Toll free alternatives are also available in various regions of the world:

Australia	+1 800 555 923 (AU-Telstra) or +1 800 000 562 (AU-Optus)
France	0800 90 91 66
Hong Kong	800 96 4262
Korea	00 308 13 1342
United Kingdom	0800 917 2863
United States	+1 800 61 RETEK or 800 617 3835

Mail	Retek Customer Support Retek on the Mall 950 Nicollet Mall Minneapolis, MN 55403
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When contacting Customer Support, please provide:

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

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Retek Customer Order Management overview

Retek Customer Order Management (RCOM) is designed and built as a dedicated business-to-consumer solution and provides an integrated, Java-based solution for managing customer orders.

Business process

Message Center
View daily messages Send daily messages
Customer Maintenance
Look up customers Maintain contact information Consolidate customers Apply for private label credit cards Maintain contact preferences Enter requests for marketing materials Review and update credit card history Review and update customer history Process stored value cards
Order Entry
Identify the customer Enter order lines Request special handling Enter messages and comments Enter payments and accommodations Review and process the order
Order Maintenance
Look up an order Edit order lines Request special handling Enter messages and comments Enter payments and accommodations Review historical information Review and process the order

Customer Service
Look up and research items Enter and resolve activity requests Review and resolve pended orders Enter and resolve personal reminders
Mail Order Entry
Set up mail order batches Enter mail orders Reconcile and release batches
Reports
Review the flash report Review mail order reports
Administration
Backorder notifications Carrier maintenance Correspondence rules Event history type Return reasons Match code rules Order fulfillment Cancel reasons Pend maintenance No information returns Standard and pop-up scripts Marketing materials System/concept parameters Call centers Work lists
Security
Set up roles Maintain role assignments

Chapter 1 – Getting started

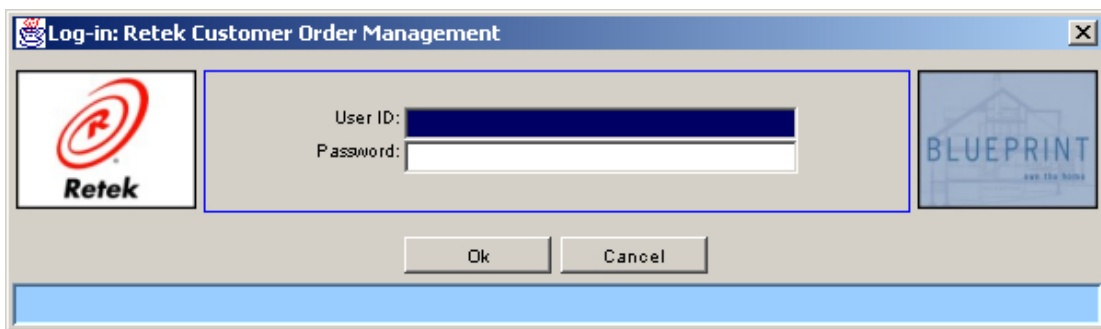
This chapter shows you how to log on to and exit the system. An introduction to navigation and helpful tools is also provided.

Log on and exit RCOM

How you access RCOM depends on how it is set up at your location. Contact your system administrator for instructions. After starting RCOM, you are prompted to log on.

Log on to RCOM

1. On the Log-in window, enter your user ID in the User ID field.



2. In the Password field, enter your password.
3. Click **OK** or press **Enter**. The RCOM application window appears.

Exit RCOM

To exit RCOM, click the close button found on the upper right corner of the application window.



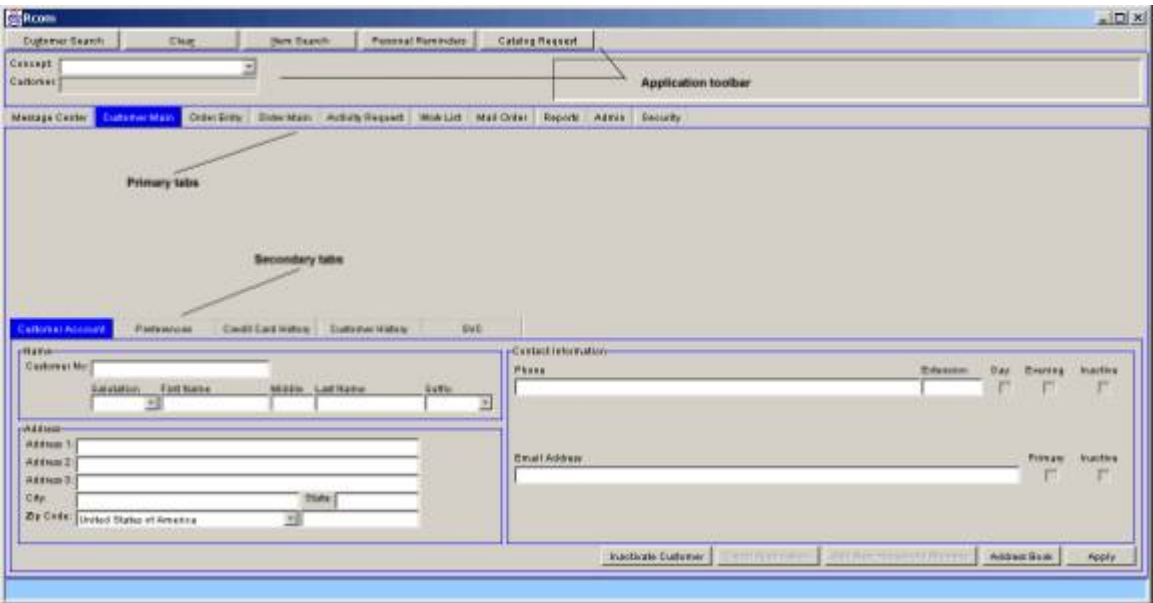
Application window

All activities are accessible from the Retek Customer Order Management application window. The application window appears after you log on to RCOM. It is divided into the following work areas:

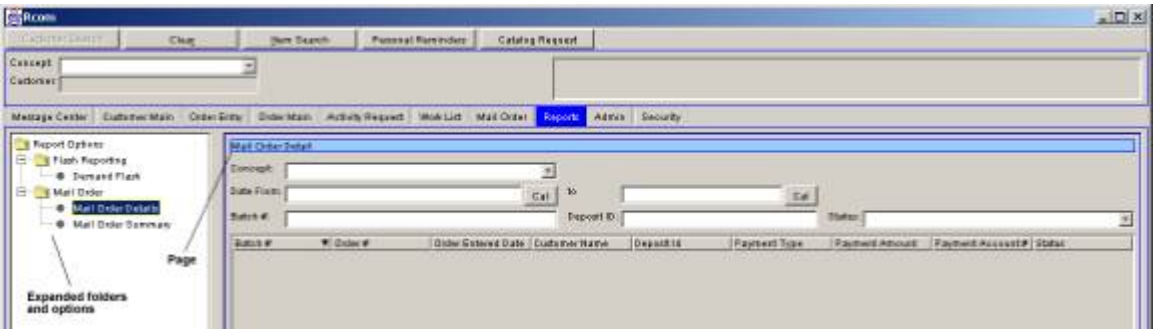
Work area	Purpose
Title bar	Located at the top of the application window. The title bar displays the product name. The three buttons at the far right on the title bar allow you to minimize, maximize, and close the application window.
Application toolbar	Located below the title bar. The toolbar provides access to commands that remain static across all tabs.
Primary tabs	Located below the application toolbar. Many of the primary tabs contain the information needed to process work on the secondary tabs. Each primary tab has one or more secondary tabs on which tasks can be completed.
Secondary tabs	Located on the lower part of most primary tabs. The secondary tabs provide an efficient and flexible workflow.
Folders	Located on the left side of some primary tabs. The folders can be expanded in order to access options. Tasks are completed on the page that appears on the right side of the primary tab.
Status bar	Located at the bottom of the application window and many of the pop-up windows. The status bar displays informational messages, warnings, and error messages to the user. The messages are color-coded: <ul style="list-style-type: none">• Blue: Informational message or no message• Yellow: Warning• Red: Error message

Navigation

The RCOM application window is divided into structured work areas. A series of primary tabs appear just below the application toolbar. On several of the primary tabs, you see a series of secondary tabs. You complete a task by navigating to the appropriate secondary tab. In several areas, you select a record on the primary tab and update the record on the secondary tab.



On some primary tabs, a folder structure appears on the left side of the tab. You expand the folder to access one or more options. When you select an option, a page is displayed to the right of the folder structure. You can complete your task on the page.



Notice that the active primary and secondary tabs appear blue and their labels are white. This visual cue makes it more apparent as to which tabs you are working on.

Drop-down lists

Some fields can only accept values from a predefined list of values. Such fields have a down arrow button to the right of the text field.

1. Click the down arrow button to display a list of values.



2. Select a value from the drop-down list. The selected value is entered in the field.

Calendars

The Cal (calendar) button allows you to view a monthly calendar and select a date. The button is found to the right of a date field.

1. Click **Cal**. The current month, year, and day are displayed in the Select Date window.



2. Select the appropriate month and year.
 - Choose a month from the drop-down list.
 - To choose an earlier year, click the previous (<<) button.
 - To choose a later year, click the next (>>) button.
3. Select a day on the calendar. The date is automatically entered in the appropriate date field.

Sort

Quite often the records in a table may be sorted in ascending or descending order by any column you choose. An arrow appears in the selected column to indicate the direction of the sort.

- To sort the records in ascending order, click on the column title by which you want to sort. A down arrow appears in the column title to remind you of the sort order.
- To sort the records in descending order, click a second time on the column title. An up arrow appears in the column title.



Records sorted by date/time and concept

Shortcuts and function keys

Shortcuts

Shortcuts provide you with a quick way to enter an expression in a text box rather than typing whole words. Shortcuts can be used when entering a greeting card message, order line message, packing slip message, warehouse message, and shipping label message.

To enter a shortcut, place the cursor in the text field. Press the Alt key and the Shift key simultaneously. While the Alt and Shift keys are depressed, type the shortcut for the expression.

The following shortcuts are available for entering common expressions.

Shortcut	Expression
BD	Beware of Dog
HA	Happy Anniversary
HB	Happy Birthday
HF	Happy Father's Day
HH	Happy Hanukkah
HM	Happy Mother's Day
HW	Happy Halloween
LN	Leave with Neighbor
MC	Merry Christmas
NP	No Packing Peanuts

Function keys

Function keys are used to navigate the application window without moving your hand from the keyboard to the mouse. The following function keys are available for navigation.

Function Key	Description
F2	Places the cursor on the primary tab. Use the arrow keys to move from one primary tab to another. Press the Enter key to activate the tab.
F3	Places the cursor on the secondary tab. Use the arrow keys to move from one secondary tab to another. Press the Enter key to activate the tab.
F4	Opens the Item Search/Product Information window and displays the Search tab.
F5	Opens the Item Search/Product Information window and displays the Product Information tab.
F6	Opens the Customer Search window.
F7	Places the cursor in the Concept drop-down list on the application toolbar. Use the arrow keys to scroll through the list.
F8	On the Order Entry primary tab (Order Line secondary tab is displayed), expands/collapses pack items in order to display/hide their component items.
F9	Places the cursor on the Customer Search button on the application toolbar. Use the arrow keys to move from one button to another. Press the Enter key to activate the button.

Chapter 2 – Message center

Daily messages may be sent to specific call centers, corporate headquarters, or all locations. By default, associates see the messages pertaining to their own location when they log on to RCOM.

The types of messages that appear in the message center may concern event notices, promotion reminders, and general information that management needs to convey to its associates.

You can perform the following tasks related to daily messages:

- View daily messages
- Send daily messages

View daily messages

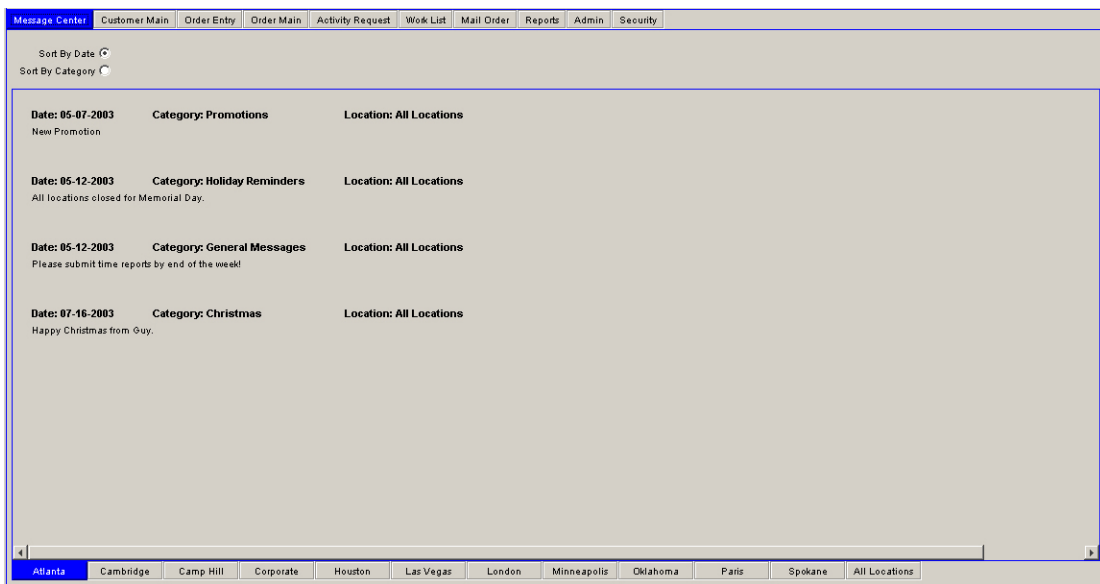
Overview

Your first view when logging on to RCOM is of the Message Center. Those messages pertaining to your location and those marked for all locations are displayed. You can choose to view messages for other locations.

Procedures

View messages

⇒ **Navigate:** Click the Message Center primary tab. The messages for the default location are displayed.



1. To view messages for a location, select the appropriate location tab positioned at the bottom of the Message Center primary tab.
2. To sort the messages:
 - By date: Select the Sort by Date option.
 - By category: Select the Sort by Category option.

Send daily messages

Overview

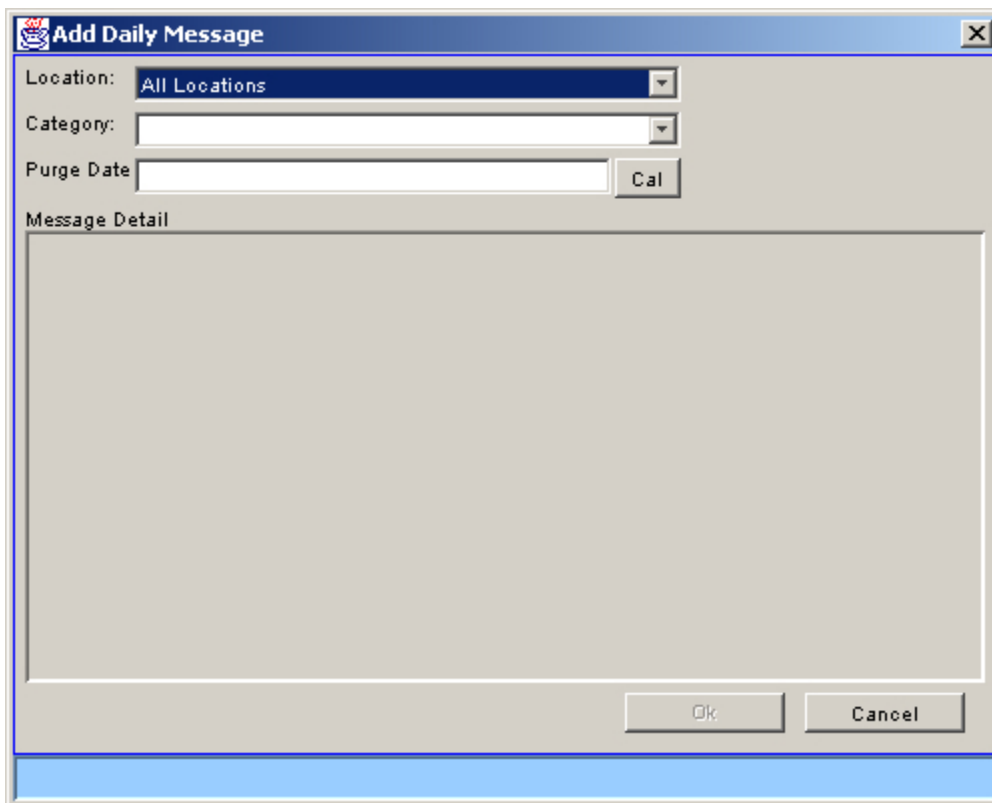
While all associates may view messages, only those with the appropriate security level have permission to create, read, update, and delete daily messages.

Procedures

Add a message

⇒ **Navigate:** On the Admin primary tab, expand the Daily Messages folder. Select the Maintain Daily Messages option. Messages for all locations are displayed on the Daily Message Maintenance page.

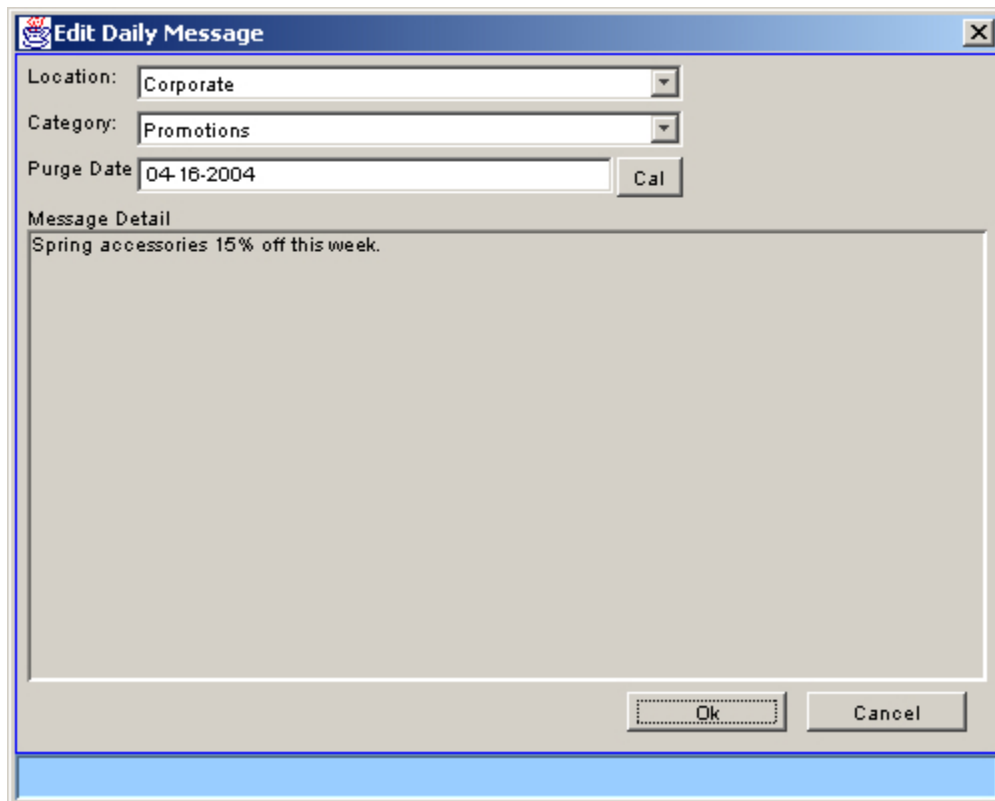
1. Click **Add Message**. The Add Daily Message window is displayed.



2. In the Location field, select the location for which the message is intended. To send the message to all locations, select All Locations.
3. In the Category field, select the category in which you want to include the message.
4. In the Purge Date field, enter the expiration date of the message, or click **Cal** and select the date.
5. In the Message Detail field, enter the text of the message.
6. Click **OK**. The message is added to the list of messages. The message becomes visible to associates at the designated location.

Edit a message

- ⇒ **Navigate:** On the Admin primary tab, expand the Daily Messages folder. Select the Maintain Daily Messages option. Messages for all locations are displayed on the Daily Message Maintenance page.
1. Select a message. If you don't see the message that you want to edit, select a different location or All Locations in the Location field.
 2. Click **Edit Message**. The Edit Daily Message window is displayed.



Edit Daily Message

Location: Corporate

Category: Promotions

Purge Date: 04-16-2004 Cal

Message Detail

Spring accessories 15% off this week.

Ok Cancel

3. Edit the enabled fields as necessary.
4. Click **OK**. The message is updated. The updated message becomes visible to associates at the designated location.

Delete a message

- ⇒ **Navigate:** On the Admin primary tab, expand the Daily Messages folder. Select the Maintain Daily Messages option. Messages for all locations are displayed on the Daily Message Maintenance page.
1. Select a message. If you don't see the message that you want to edit, select a different location or All Locations in the Location field.
 2. Click **Delete Message**. The message no longer appears on the list. The message is no longer visible to associates at the designated location.

Chapter 3 – Customer maintenance

The customer maintenance tabs provide a central repository of all interactions with a customer. The information stored under customer maintenance allows you to enhance the customer experience, reduce call time, run efficient marketing programs, and reduce fraud.

You can accomplish the following customer maintenance tasks.

- Look up customers
- Maintain contact information
- Consolidate customers
- Apply for private label credit cards
- Maintain contact preferences
- Enter requests for marketing materials
- Review and update credit card history
- Review and update customer history
- Process stored value cards

When a customer is entered or retrieved in the Customer Maintenance area, the customer information is displayed on the Order Entry and Activity Request tabs. You need not re-enter the information just because you navigated to either of those areas.

Look up customers

Overview

Rather than re-enter basic information about an existing customer, you can use the Search function to look up a customer. A search is performed across all channel types and concepts. Searches are not case sensitive. You can use either lowercase, uppercase, or mixed case letters in the text fields. Wildcard searches are also applicable.

Procedures

Look up a customer

⇒ **Navigate:** Select the Customer Main, Order Entry, or Mail Order primary tab.

1. Click **Customer Search** on the application toolbar. The Customer Search window is displayed.

2. Enter criteria in one or more of the search criteria fields.
3. Click **Search**. The results are displayed in the Search results block.



Note: To terminate a search before the results are displayed, click **Cancel Search**. You can then edit the criteria, or click **Cancel** to close the Customer Search window.

4. Select a customer record.



Note: If the customer is not found, click **New Customer**. The Create New Customer window is displayed. Enter the new customer's name and contact information in the window. When you click **Apply**, the new record is saved and becomes available for you to use.

5. Click **OK**. The customer record is retrieved for your use.

As an alternative search method, you can enter search criteria on the Customer Main > Customer Account tab. When you click **Customer Search** on the application toolbar, the results are displayed in the Customer Search window.

Wildcard searches

Wildcard searches are permitted. The wildcard is an asterisk (*). You can place the asterisk before, after, or between one or more characters. You must enter at least one character in addition to the asterisk. Some examples of wildcard searches include:

- Enter mu* in the Last Name field to retrieve customers named Murphy, Murray, or Murdock.
- Enter *rk in the City field to retrieve customers located in York or New York.
- Enter 5*3 in the Zip field to retrieve customers whose zip code is 55123, 55403, or 55413.

Maintain contact information

Overview

A customer must have at least one mailing address and a telephone number. Should you enter one address for a customer, it is marked as the primary bill-to and primary ship-to address.

Additional addresses for the current customer are entered in the address book. You can indicate which address is the default ship-to address. The address book is accessible from several areas in RCOM.

Multiple customers can be grouped under one household number. Household numbers are assigned by an external system. Once a customer has a household number, you can add additional customers to the household.

Procedures

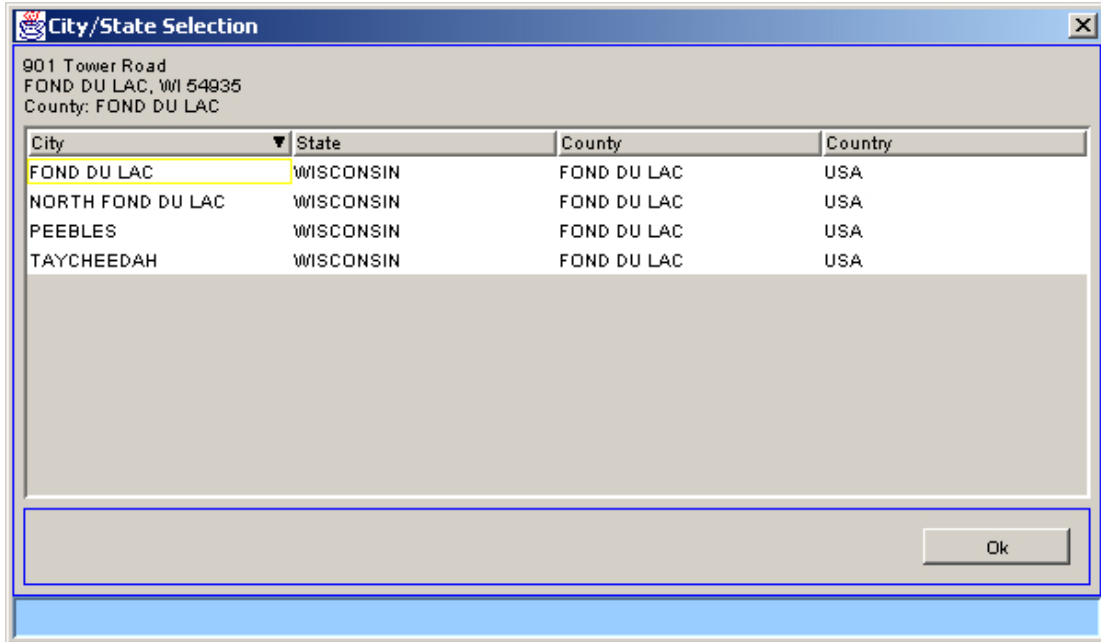
Add a customer

⇒ **Navigate:** On the Customer Main primary tab, select the Customer Account secondary tab.

1. In the Name block, enter the customer's name.
2. In the Address block, enter the customer's bill-to address.

By default, you skip the City and State fields and enter a zip code in the Zip Code field. The system looks up the zip code and recommends a city and state.

- If only one location is valid for the zip code, the City and State fields are automatically filled in.
- If multiple locations are valid, the results are displayed in the City/State Selection window. Select a location and click **OK**. The City and State fields are automatically filled in.



A screenshot of a 'City/State Selection' dialog box. The title bar is blue with a small icon on the left and a close button on the right. Below the title bar, the address '901 Tower Road', 'FOND DU LAC, WI 54935', and 'County: FOND DU LAC' are displayed. A table with four columns: 'City', 'State', 'County', and 'Country' is shown. The 'City' column has a dropdown arrow. The first row is highlighted with a yellow border. Below the table is a large empty text area. At the bottom right is an 'Ok' button.

City	State	County	Country
FOND DU LAC	WISCONSIN	FOND DU LAC	USA
NORTH FOND DU LAC	WISCONSIN	FOND DU LAC	USA
PEEBLES	WISCONSIN	FOND DU LAC	USA
TAYCHEEDAH	WISCONSIN	FOND DU LAC	USA

3. In the Contact Information block, enter the customer's telephone numbers and e-mail addresses. Indicate which telephone number is the daytime number and which is the evening number. If there are multiple e-mail addresses, indicate which is the primary e-mail address.
4. Click **Apply**. The customer record is saved.

Add an address to the address book

- ⇒ **Navigate:** On the Customer Main primary tab, select the Customer Account secondary tab. Look up and select a customer. The customer's bill-to address is displayed on the Customer Account secondary tab.

Click **Address Book**. All addresses associated with the customer are displayed on the Address Book window.

Address Book: Sydney Greenstreet

Label	First	Last	Address1	City	State	Zip	Type
Master Address	Sydney	Greenstreet	901 Tower Road	FOND DU LAC	WI	54935	Primary Ship/Bill

Address Book:

Shipping Label: Default Ship-To: ☐

Sal: First: MI: Last: Suffix:

Address 1: Day Phone: Ext:

Address 2: Evening Phone: Ext:

Address 3: Email:

City: State:

Zip Code: United States of America



Note: The Address Book is accessible from several areas of RCOM. Generally, it is accessible from wherever a customer address is needed.

1. Click **Add**. The data entry fields in the Address Book block are enabled.
2. Enter the shipping label, name, address, and contact information of the customer.



Note: To enter another ship-to address for the current customer, click **Use Customer Info**. The name, telephone number, and e-mail address fields are automatically filled in. Enter the shipping label and address. Update any default information as necessary.

3. [Optional] To indicate that the address should be the default ship-to address, select the Default Ship-To check box.
4. [Optional] If you enter a new person in the address book, select the New Customer check box. The new customer is recorded as an entry in the original customer's address book and as a unique customer with his/her own address book.
5. Click **Save**. The address is added to the Address List block.
6. Enter any additional customers or customer addresses.
7. When done, click **Close**.

Add a customer to a household

⇒ **Navigate:** On the Customer Main primary tab select the Customer Account secondary tab. Enter a household number in the Customer No field.



Note: If the household has more than one member, the Matched Customers window is displayed.

1. Click **Add New Household Member** on the Customer Account tab or the Matched Customers window if it appears. The primary bill-to address appears on the Customer Account tab.
2. In the Name block, enter the name of the new customer.
3. In the Contact Information fields, enter the telephone numbers and e-mail addresses. Indicate which telephone number is the daytime number and the evening number. If there is more than one e-mail address, indicate which is the primary e-mail address.
4. Click **Apply**. The fields in the Address Block are enabled.
5. Edit the address as necessary.
6. Click **Apply**. If you updated the address, you are prompted to enter a reason for the address change. Select the reason and click **OK**. The customer is added to the household.

Edit a customer

⇒ **Navigate:** On the Customer Main primary tab select the Customer Account secondary tab. Look up and select a customer. The customer's bill-to address is displayed on the Customer Account secondary tab.

1. To edit the bill-to address:
 - a. Edit the enabled fields on the Customer Account secondary tab.
 - b. Click **Apply**. You are prompted to enter a reason for the update.
 - c. Select a reason and click **OK**. The address is updated.
2. To edit other addresses for the current customer:
 - a. Click **Address Book**. The Address Book window is displayed.
 - b. Select an address in the Address List block.
 - c. Click **Edit**. The fields are enabled in the Address Book block.
 - d. Edit the enabled fields as necessary.
 - e. Click **Save**. The address is updated.
 - f. Click **Close** to close the window.

Consolidate customers

Overview

Whenever you enter a new customer in Customer Maintenance, the system automatically compares the customer name and contact fields against existing customer records.



Note: In order to use match code functionality, match code functionality must be made active in the system parameters and rules must be set up.

If matches are found, the potential duplicates are displayed for you to review. You can choose an existing customer or bypass the recommended matches and continue entering the new customer. You can also choose to merge customers that appear in the Matched Customers window.

Customer records can also be merged from the Customer Search window. In either case, you are entering a request to merge customers. The merge request is processed by an external system and the results are returned to RCOM.

Procedures

Consolidate customers

⇒ **Navigate:** On the Customer Main primary tab, select the Customer Account secondary tab.

1. Click **Customer Search**. The Customer Search window is displayed.
2. Enter search criteria in the Search Criteria block.
3. Click **Search**. The results are displayed in the Search Results block.
4. Select two or more records that you want to merge. Click **Merge**. The selected records are displayed in the Choose Primary Customer window.

#	First	M	Last	Phone	Email	Address 1	Address 2	City	State	Zip
1	Sydney		Greenstreet	(920) 922-6777		901 Tower Road		FOND DU LAC	WI	54935
2	Victoria		Greenstreet	(920) 922-7677		901 Tower Road		FOND DU LAC	WI	54935

At the bottom of the window are 'Ok' and 'Cancel' buttons.

5. Select the customer record that you want to mark as the primary record.
6. Click **OK**. You are returned to the Customer Search screen.
7. Select the customer record that you want to use and click **OK**.
To close the window without selecting a customer, click **Cancel**.

Apply for private label credit cards

Overview

Customers can apply for a private label credit card (PLCC) offered by the business group. When customers use a PLCC for payment, they may earn reward certificates or become eligible for promotional offers.

Procedures

Request a private label credit card

⇒ **Navigate:** Look up and select a customer. On the Customer Main primary tab, select the Customer Account secondary tab.



Note: A credit card can be applied for during order entry from the Order Entry and Mail Order primary tabs.

1. On the Customer Account secondary tab, click **Credit Application**. The Apply for Credit window is displayed.

Apply for Credit

Name: Sydney Greenstreet

Address 1: 901 Tower Road

Address 2:

Address 3:

City: FOND DU LAC State: WI

Zip Code: United States of America 54935

Phone Number: 9209226777

Tender Type:

Pre-Approval Code:

Date of Birth: Cal

Last 4 digits of SSN:

Apply Cancel

2. In the Tender Type field, select the credit card requested by the customer.
3. In the Date of Birth field, enter the customer's birthdate, or click **Cal** and select the birthdate.
4. In the Last 4 Digits of SSN field, enter the last four digits of the customer's social security number.
5. Click **Apply**. A message appears on the status bar of the Apply for Credit window indicating whether the application was approved or declined. If approved, the customer can begin using the credit card to pay for orders.

Maintain contact preferences

Overview

Customers can indicate how and when they prefer to be contacted. They may state whether they want their mail or e-mail address shared with entities that are unrelated to the company. They may also indicate whether they prefer to receive mailings only once per season. The customer's choice to decline a private label credit card (PLCC) can also be noted.

Since a customer can have multiple mailing addresses, telephone numbers, and e-mail addresses, you should verify which are the primary bill-to and ship-to addresses, daytime and evening telephone numbers, and primary e-mail address.

Procedures

Maintain contact preferences

- ⇒ **Navigate:** Look up and select a customer. On the Customer Main primary tab, select the Preferences secondary tab.

1. Select the check box for each preference the customer wants to activate. To deactivate a preference, clear the check box.

Preference	Description
Mail Only Once Per Season	Do not send promotions by regular mail more than once per season.
Do Not Share Address	Do not share the customer's bill-to address with entities that are not part of the retailer's organization.
Do Not Share E-mail	Do not share the customer's e-mail address with entities that are not part of the retailer's organization.
Do Not Mail	Do not mail promotions to the customer.
Do Not Call	Do not telephone the customer regarding promotions.
Do Not E-mail	Do not send promotions to the customer by e-mail.
Credit Card Opt Out	Do not offer a private label credit card to the customer.

2. In the Preferred Contact Method field, select the method by which the customer prefers to be contacted.
3. In the Preferred Contact Time field, select the time of day when the customer prefers to be contacted.
4. Click **Apply**. The customer's preferences are updated.

Enter requests for marketing materials

Overview

Customers may request marketing materials, such as catalogs, brochures, and newsletters. The customer can request the documents without placing an order. You can provide the customer with an estimated customer delivery date for each document. Requests are batched together and transmitted to a publisher for fulfillment.

Procedures

Request marketing materials

⇒ **Navigate:** Look up and select a customer.



Note: If the customer is new, you can enter the new customer directly on the Catalog Request window.

1. Click **Catalog Request** on the application toolbar. The Catalog Request window is displayed.

	ECDD
<input type="checkbox"/> Chambers	02-13-2004
<input type="checkbox"/> Hold Everything	02-07-2004
<input type="checkbox"/> Williams Sonoma	02-04-2004

2. Select the check box next to each document that the customer requests.
3. To make any changes to the customer's ship-to address:
 - a. Click **Address Book**. The customer's contact information is displayed on the Address Book window.
 - b. Select the customer address that you want to use.
 - c. Click **Use**. You are returned to the Catalog Request window.
4. Click **Submit Request**. The requests are exported to the fulfillment center.

Review and update credit card history

Overview

When a customer uses a credit card to pay for an order, the credit card information is stored for future reference. You can view all the credit cards associated with a customer. You do not see the full credit card number displayed on the page. Instead the first 12 digits are displayed as asterisks (*) and the last four digits are valid numbers from the credit card.

Credit cards are added to a customer record during order entry or order maintenance. The cardholder name and expiration date can be modified during order entry and order maintenance. Credit cards are inactivated as part of the customer maintenance process. Once inactivated, a credit card is no longer visible and, therefore, is no longer available for use.

Procedures

Inactivate credit cards

⇒ **Navigate:** Look up and select a customer. On the Customer Main primary tab, select the Credit Card History secondary tab. The customer's credit card information is displayed on the Credit Card History secondary tab.

Concept	Credit Card Type	Credit Card Number	Expiration Date	Name of Cardholder	Inactive
Pottery Barn	Pottery Barn	*****0005	12-31-2008	Michael W. Penzhek	<input type="checkbox"/>
Pottery Barn	Visa	*****0002	12-31-2008	Michael W. Penzhek	<input type="checkbox"/>

Apply

1. Select the Inactive check box next to each credit card that you want to inactivate.
2. Click **Apply**. The customer's credit card history is updated.

Review and update customer history

Overview

Each time an associate interacts with a customer, an event is recorded. You can view a high-level summary of the events that are associated with a customer. The summary provides the type of event, the associate who created or updated the event, and the date, time, and details of the event.

Should you need additional information or want to update an event, you can jump to the appropriate primary and secondary tab.

Procedures

View customer history

- ⇒ **Navigate:** Look up and select a customer. On the Customer Main primary tab, select the Customer History secondary tab. All events pertaining to the customer are displayed on the Customer Main primary tab.

The screenshot displays the Rcom application window titled "Rcom rcom11int-20041018-1252". The interface includes a top navigation bar with tabs: "Customer Search", "Clear", "Item Search", "Personal Reminders", "Catalog Request", and "Help". Below this is a search area with "Concept: NEXCOM" and a "Customer:" field. A secondary navigation bar contains tabs: "Message Center", "Customer Main" (selected), "Order Entry", "Order Main", "Activity Request", "Work List", "Mail Order", "Reports", "Admin", and "Security". The main content area features a table with columns: "Date / Time", "Concept", "Channel", "User", "Event Type", and "Event Details". The table is currently empty. At the bottom, there is a "Comments" button and a row of tabs: "Customer Account", "Preferences", "Credit Card History", "Customer History" (selected), and "SVC".



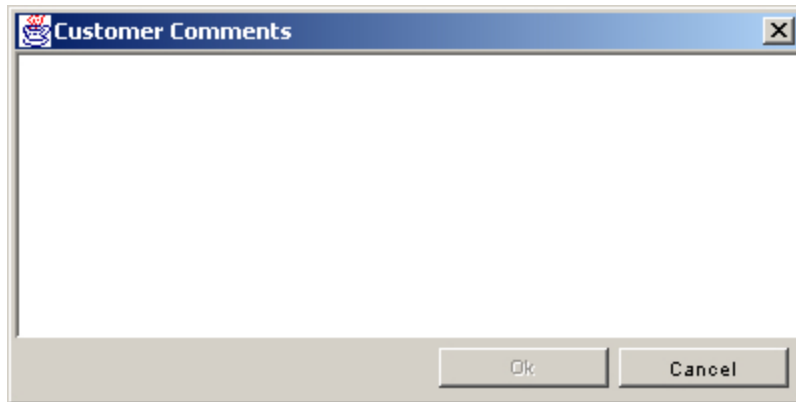
Note: The secondary tabs move to the bottom of the Customer Main primary tab.

1. To view the details of an event:
 - Double-click the event, or
 - Select the event and press the Enter key.
2. To sort the events in ascending or descending order:
 - Click the column heading by which you want to sort.
 - Click the column heading a second time in order to sort the records in the opposite direction.

Add a comment

⇒ **Navigate:** Look up and select a customer. On the Customer Main primary tab, select the Customer History secondary tab. All events pertaining to the customer are displayed on the Customer Main primary tab.

1. Click **Comments**. The Customer Comments window is displayed.



2. Enter a comment in the text field.
3. Click **OK**. The comment is added to the customer history as an Associate Comments event.

Process stored value cards

Overview

Customers with stored value cards (SVC) can inquire as to the remaining balance of such cards. There are two types of stored value cards: gift cards and merchandise cards. Merchandise cards may be issued to customers for a return, an exchange, or as a customer service courtesy. The customer can use the card only within the same concept for which it was issued. A merchandise card can not be cashed out. That means the customer can not exchange the card for cash.

Customers can purchase gift cards for a predefined or customer-defined amount. Should the customer desire, the gift card can be exchanged for cash. To cash out a gift card, the customer must provide a personal identification number (PIN). A personal check is sent to the customer for the balance remaining on the card.

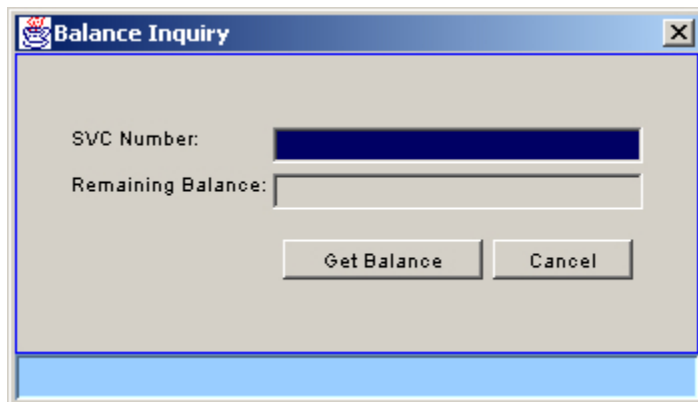
Cash out functionality is enabled only for those associates with the appropriate security permission. If you do not have such permission but must enter a cash out request for a customer, you can do so on the Activity Request tab. Submit a general request with the necessary information.

Procedures

Look up the balance of an SVC

⇒ **Navigate:** Look up and select a customer. On the Customer Main primary tab, select the SVC secondary tab.

1. Click **Balance Inquiry**. The Balance Inquiry window is displayed.

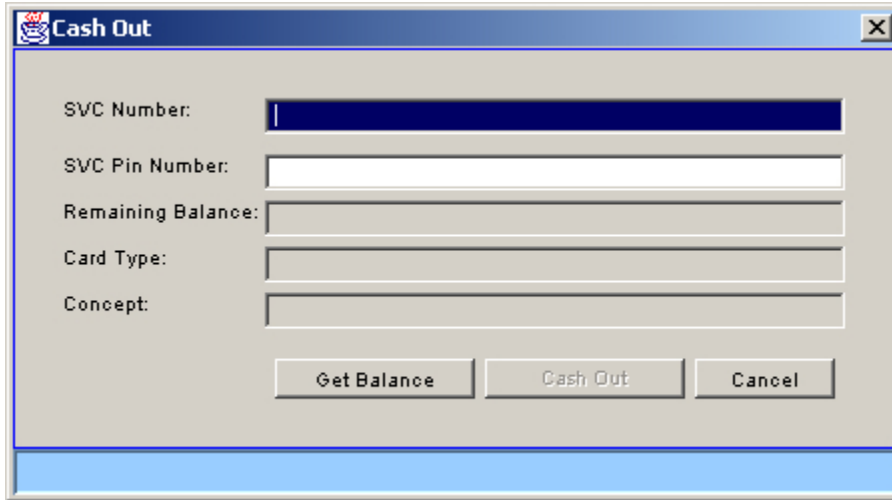


2. In the SVC Number field, enter the ID of the stored value card.
3. Click **Get Balance**. The balance is displayed in the Remaining Balance field.
4. To close the window, click **Cancel**.

Cash out a gift card

⇒ **Navigate:** Look up and select a customer. On the Customer Main primary tab, select the SVC secondary tab.

1. Click **Cash Out**. The Cash Out window is displayed.



The screenshot shows a 'Cash Out' dialog box. It contains the following fields and buttons:

- SVC Number: [Text Input Field]
- SVC Pin Number: [Text Input Field]
- Remaining Balance: [Text Input Field]
- Card Type: [Text Input Field]
- Concept: [Text Input Field]
- Buttons: Get Balance, Cash Out, Cancel

2. In the SVC Number field, enter the ID of the stored value card.
3. In the SVC Pin Number field, enter the customer's personal identification number.
4. Click **Get Balance**. The remaining balance, card type, and concept are displayed.
5. If the card type is Gift Card, click **Cash Out**. A message appears on the status bar of the Cash Out window indicating that a personal check will be sent to the customer for the remaining balance on the Gift Card.

Chapter 4 – Order entry

The primary task in Order Entry is to enter customer orders as they are received by telephone. During the order entry process you perform the following tasks:

- Identify the customer
- Enter order lines
- Request special handling
- Enter messages and comments
- Enter payments and accommodations
- Review and process the order

If the order cannot be completed for any reason, it can be pended for completion at a later time. Pended orders are revised and completed in Order Maintenance rather than Order Entry.

Identify the customer

Overview

Customer contact information may be entered in a variety of ways:

- The customer might not be new. Look up and select a customer. The customer's primary bill-to and ship-to addresses are automatically filled in.
- The customer is new. Enter the customer on the Customer Main > Customer Account tab. When you return to the Order Main > Customer tab, the customer's primary bill-to and ship-to addresses are automatically filled in.
- The customer is not new and can provide a customer number or household number. After entering the number, the customer's primary bill-to and ship-to addresses are automatically filled in. If more than one customer is associated with a household number, you are prompted to select the desired customer.

Procedures

Select a different bill-to address

The bill-to address is selected while working on the Customer secondary tab. The ship-to address, however, is selected while working on the Order Line secondary tab. While an order has one bill-to address, there can be multiple ship-to addresses. Each order line on a customer order could have a different ship-to address.

- ⇒ **Navigate:** On the Order Entry primary tab, select the Customer secondary tab. Look up and select a customer. The primary bill-to and ship-to address are automatically filled in on the Customer secondary tab.
1. Click **Address Book** in the Bill-To Address block. All known addresses for the customer are displayed in the Address Book window.

Address Book: Sydney Greenstreet

Label	First	Last	Address1	City	State	Zip	Type
Master Address	Sydney	Greenstreet	901 Tower Road	FOND DU LAC	WI	54935	Primary Ship/Bill

Address Book: Shipping Label: Master Address Default Ship-To: ☒

Sal.: First: MI: Last: Suffix:

Address 1: 901 Tower Road Day Phone: (920) 922-6777 Ext:

Address 2: Evening Phone: (920) 922-6777 Ext:

Address 3: Email:

City: FOND DU LAC State: WI Zip Code: United States of America 54935

Use Customer Info Create New Customer ☐

Add Edit Inactivate Use Clear Save Close

2. Select an address.
3. Click **Use**. The window is closed and the selected address is entered in the Bill-To Address block.

Enter order lines

Overview

An order consists of one or more order lines. As you add an item to an order line, you also state the size, color, fabric, or other characteristics in order to fully describe the item. When you enter the quantity requested by the customer, the extended price and any additional charges are automatically calculated. Although default shipping information is automatically filled in, you can select a different ship-to address, carrier service, and carrier per the customer's request.

After adding an item to the order, you can provide the customer with an estimated customer delivery date. The reserved and backordered quantities are calculated. If the customer decides not to order an item, you can cancel the order line.

Personalization, monogramming, and gift services may be added to some order lines, depending on the item and the customer's needs. Special instructions can be entered for each order line as necessary.

As order lines are added to the order, they appear on the Order Entry primary tab. Since more information is provided than can be displayed at one time, you can click **Additional Information** to view the hidden fields. Click **Previous Information** to redisplay the original set of fields.

Procedures

Add an order line

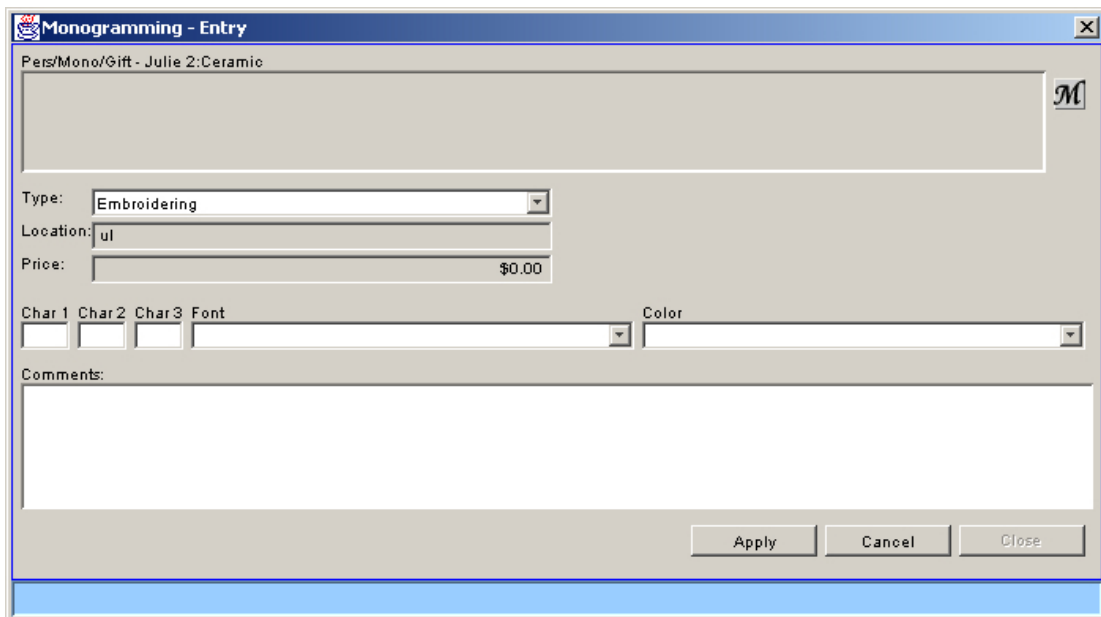
⇒ **Navigate:** On the Order Entry primary tab, select the Order Line secondary tab.

1. Enter the selling item number in the Selling Item field.
2. In the description fields, select the appropriate characteristics of the item.
3. In the Quantity field, enter the number of units that the customer requests.
4. If the item is eligible for personalization or monogramming services, you may be prompted to enter the necessary information. Enter the customer's instructions or click **Cancel** to bypass the prompts.
5. If the item is eligible for gift services and the customer requests them, click the gift icon. Enter the details in the Gift window.

6. If any special instructions need to be entered for the item, click **Warehouse Message**. Enter the instructions in the Order Line Instruction Message window.
7. If the customer orders an item for delivery to someone else and the item is backordered, the Backorder Notice to Ship-To check box is enabled. Select the check box if the customer wants a backorder notice sent to the recipient.
8. Enter any changes to the shipping instructions in the Shipping Info block.
9. Click **Apply to Order**. The item is added to the order. The order line is displayed on the Order Entry primary tab.
10. Enter any additional order lines.

Request a monogramming service

- ⇒ **Navigate:** On the Order Entry primary tab, select the Order Line secondary tab.
1. Enter or select an item that is eligible for monogramming.
 2. Click the monogramming icon. The Monogramming Entry window is displayed.



Note: The Monogramming Entry window automatically pops up when you enter an eligible item that is not a direct ship item. The Component block appears on the window if the selected item is a pack.

3. If the selected item is a pack, select the component item that the customer wants to monogram.
4. In the Type field, select the type of monogramming requested by the customer.
5. In the Char 1 - 3 fields, enter the characters requested by the customer.
6. In the Font and Color fields, select the font and color requested by the customer.
7. In the Comments field, enter any additional instructions regarding the monogramming request.
8. Click **Apply**. The instructions are saved with the order line.

Request a personalization service

⇒ **Navigate:** On the Order Entry primary tab, select the Order Line secondary tab.

1. Enter or select an item that is eligible for personalization.
2. Click the personalization icon. The Personalization Entry window is displayed.

DS Pets - Mono and Gifting:Small

Type: **Engraving**

Location: LL

Price:

Personalization Text	Num Char.	Font	Color
	25		
	25		

Comments:

Apply Cancel Close



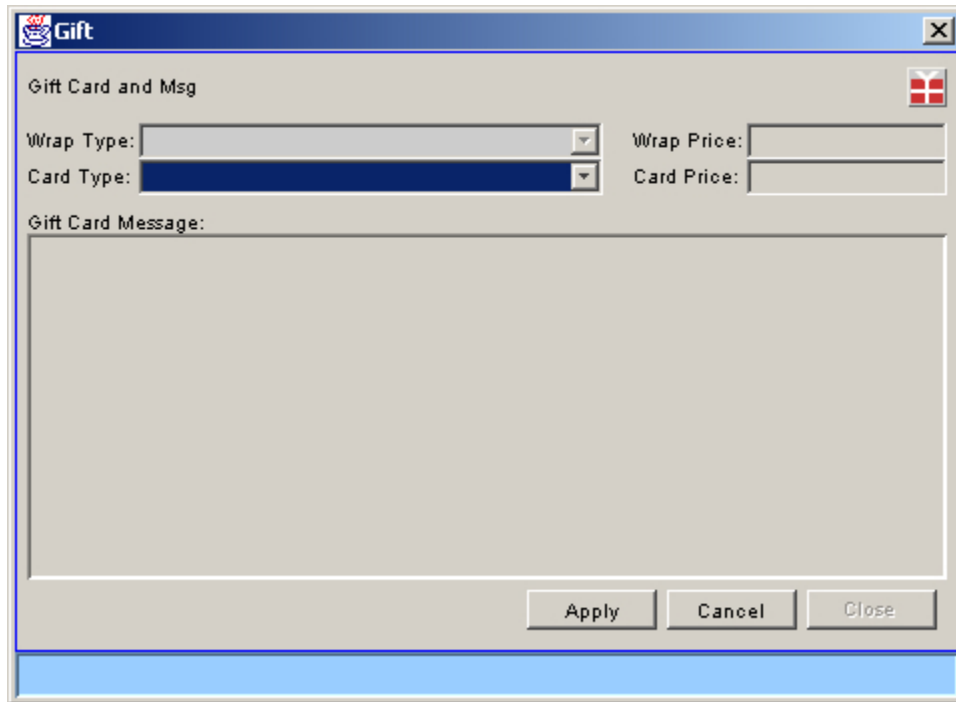
Note: The Personalization Entry window automatically pops up when you enter an eligible item that is not a direct ship item. If the item is eligible for both monogramming and personalization, the Monogramming Entry window is displayed first. The Component block appears on the window if the selected item is a pack.

3. If the selected item is a pack, select the component item that the customer wants to personalize.
4. In the Type field, select the type of personalization requested by the customer.
5. In the Personalization Text fields, enter the text requested by the customer.
6. In the Font and Color fields, select the font and color requested by the customer.
7. In the Comments field, enter any additional instructions regarding the personalization request.
8. Click **Apply**. The instructions are saved with the order line.

Request gift services

⇒ **Navigate:** On the Order Entry primary tab, select the Order Line secondary tab.

1. Enter or select an item that is eligible for gift services.
2. Click the gift icon. The Gift window is displayed.



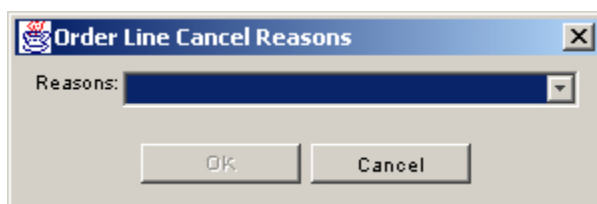
The screenshot shows a window titled "Gift" with a close button (X) in the top right corner. Inside the window, there is a section labeled "Gift Card and Msg" with a small gift icon in the top right. Below this label, there are four input fields: "Wrap Type:" and "Card Type:" are dropdown menus, while "Wrap Price:" and "Card Price:" are text boxes. Below these fields is a large text area labeled "Gift Card Message:". At the bottom of the window, there are three buttons: "Apply", "Cancel", and "Close".

3. In the Wrap Type field, select the type of gift wrap requested by the customer.
4. In the Card Type field, select the type of greeting card requested by the customer.
5. If you selected a card type, enter the message to be printed on the card in the Gift Card Message field. You can use shortcut keys to enter common expressions.
6. Click **Apply**. The instructions are saved with the order line.

Cancel an order line

⇒ **Navigate:** On the Order Entry primary tab, select the Order Line secondary tab.

1. On the Order Entry primary tab, select an order line.
2. Click **Cancel Order Line**. The Order Line Cancel Reasons window is displayed.



The screenshot shows a window titled "Order Line Cancel Reasons" with a close button (X) in the top right corner. Inside the window, there is a label "Reasons:" followed by a dropdown menu. At the bottom of the window, there are two buttons: "OK" and "Cancel".

3. In the Reasons field, select the reason for the cancellation.
4. Click **OK**. The status of the order line changes to Cancelled and the reservation for the requested quantity is released.

Add a gift certificate

Additional information is needed to process requests for gift certificates. The customer must provide the names of the sender and the recipient, as well as the message to be printed on the gift certificate. Since the default value of the gift certificate is zero, the customer must state the amount.

⇒ **Navigate:** On the Order Entry primary tab, select the Order Line secondary tab.

1. Enter the item number of a gift certificate in the Selling Item field. When you tab to the Quantity field, the Gift Certificate window is displayed.

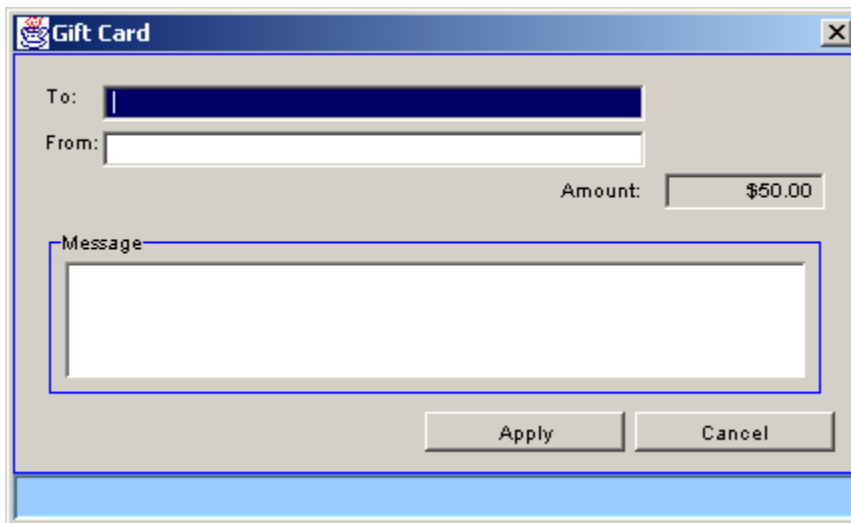
2. In the To field, enter the name of the recipient as designated by the customer.
3. In the From field, enter the name of the sender as designated by the customer.
4. In the Amount field, enter the monetary value of the gift certificate requested by the customer.
5. In the Message field, enter the text of the customer's message for the recipient.
6. Click **Apply to Order Line**. The window is closed.
7. In the Shipping Info block, edit any of the shipping information as necessary.
8. Click **Apply to Order**. The gift certificate is added to the order. The order line is displayed on the Order Entry primary tab.
9. Enter any additional order lines.

Add a gift card

When ordering a gift card, the customer can choose from one or more designs. If the card has predefined values, the customer must select the value of the card. If there is no predefined value, then an amount must be entered. The customer must provide the names of the sender and the recipient, as well as the message to be printed on the gift card.

⇒ **Navigate:** On the Order Entry primary tab, select the Order Line secondary tab.

1. Enter the item number of a gift card in the Selling Item field.
2. In the Description fields, select the design of the gift card and the monetary value of the gift card. When you tab to the next field, the Gift Card window is displayed.



3. In the To field, enter the name of the recipient as designated by the customer.
4. In the From field, enter the name of the sender as designated by the customer.
5. If the gift card does not have a predefined monetary value, enter the amount in the Amount field.
6. In the Message field, enter the text of the customer's message for the recipient.
7. Click **Apply**. The window is closed.
8. In the Shipping Info block, edit the shipping information as necessary.
9. Click **Apply to Order**. The gift card is added to the order. The order line is displayed on the Order Entry primary tab.
10. Enter any additional order lines.

Request special handling

Overview

After identifying the items to be ordered, the customer can request that items be processed together and wrapped together. If the estimated customer delivery date differs between items that must be processed together, the earlier items will be held for the later items. These requests cannot be applied to direct ship items.

A hold can be placed on items for special events or until a specified date. Holds can be placed on items whether or not they are direct ship items.

Procedures

Request that items be processed together

- ⇒ **Navigate:** On the Order Entry primary tab, select the Special Handling secondary tab. The ship-to addresses are displayed on the Order Entry primary tab.
1. Select a ship-to address. The order lines for the selected ship-to address are displayed on the Special Handling secondary tab.

Selling Item	Description	ECDD	Direct Ship	P.T.	W.T.	Wrap Type	Wrap Price	Card Type	Card Price	Event Hold	Date Hold
017-100243085	DS Pairs - Mono and Giftin...	02-11-2004	<input checked="" type="checkbox"/>	P			\$0.00		\$0.00		
075-100227937	Gift Card and Mpg - No Wra...	02-03-2004	<input checked="" type="checkbox"/>	P			\$0.00	Balloon Birthday Gift Card	\$10.00		
239-100353031	PearlMono/Gift - Julie 2: Cer...	02-03-2004	<input checked="" type="checkbox"/>	W			\$0.00		\$0.00		

2. Select two or more order lines. Use the following methods to select multiple order lines:
 - To select all of the order lines, press Ctrl + A.
 - To select consecutive order lines, select one order line. Press and hold the Shift key. Select the last order line in the series. Release the Shift key.
 - To select non-consecutive order lines, select one order line. Press and hold the Ctrl key. Select each additional order line. Release the Ctrl key.
3. To request that items be shipped together:
 - a. Select two or more order lines.
 - b. Click **Process Together**. Notice in the PT column that the same character appears for each of the selected order lines. This indicates that the order lines must be processed together.

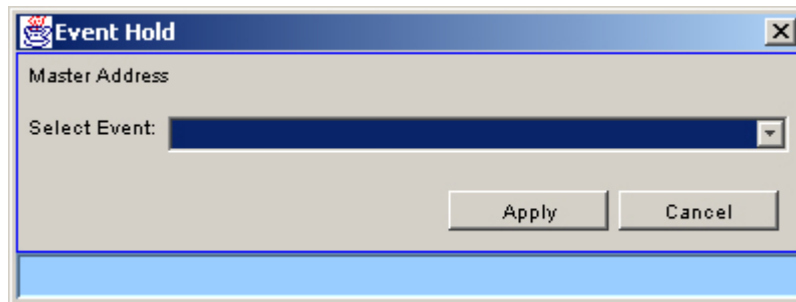


Note: If the order lines have different estimated customer delivery dates (ECDD), they are all updated to the latest ECDD.

4. To request that items be gift wrapped together:
 - a. Select two or more order lines.
 - b. Click **Wrap Together**. Notice in the WT column that the same character appears for each of the selected order lines. This indicates that the order lines must be wrapped together.

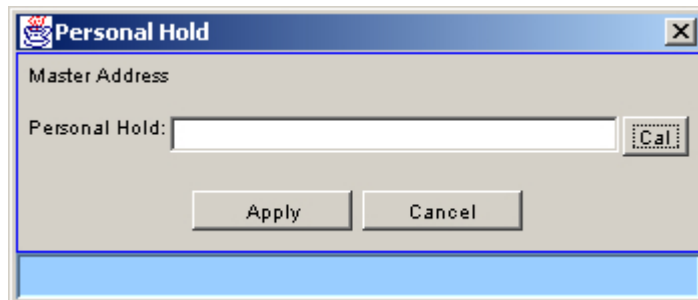
Place a hold on items

- ⇒ **Navigate:** On the Order Entry primary tab, select the Special Handling secondary tab. The ship-to addresses are displayed on the Order Entry primary tab.
1. Select a ship-to address. The order lines for the selected ship-to address are displayed on the Special Handling secondary tab.
 2. Indicate whether the customer wants to delay a shipment due to a special event:
 - **Predefined event:** Select one or more order lines. Click **Event Hold**. The Event Hold window is displayed. Select the event. Click **Apply**. The event appears in the Event Hold field for the selected items.



The Event Hold dialog box is shown. It has a title bar with a Retek logo and the text 'Event Hold'. Inside, there is a 'Master Address' label. Below it is a 'Select Event:' label followed by a dropdown menu. At the bottom right, there are two buttons: 'Apply' and 'Cancel'.

- **Customer-defined date:** Select one or more order lines. Click **Date Hold**. The Personal Hold window is displayed. Enter a date, or click **Cal** and select a date. Click **Apply**. The date appears in the Date Hold field for the selected items.



The Personal Hold dialog box is shown. It has a title bar with a Retek logo and the text 'Personal Hold'. Inside, there is a 'Master Address' label. Below it is a 'Personal Hold:' label followed by a text input field. To the right of the input field is a small button labeled 'Cal'. At the bottom, there are two buttons: 'Apply' and 'Cancel'.



Note: The estimated customer delivery dates are updated accordingly.

Clear special handling requests

- ⇒ **Navigate:** On the Order Entry primary tab, select the Special Handling secondary tab. The ship-to addresses are displayed on the Order Entry primary tab.
1. Select a ship-to address. The order lines for the selected ship-to address are displayed on the Special Handling secondary tab.
 2. Select one or more order lines.
 3. Click **Clear**. The special handling instructions are cleared.

Enter messages and comments

Overview


You can enter messages that will appear on documents made available to customers (packing slip), warehouse personnel (pick instructions), and carriers (shipping labels). You can also append a comment to the order for future reference.

Procedures

Enter messages

- ⇒ **Navigate:** On the Order Entry primary tab, select the Order Messages secondary tab. The ship-to addresses are displayed on the Order Entry primary tab. Select the ship-to address that you want to process.

The screenshot shows a software window with several tabs: Customer, Order Line, Special Handling, Order Messages (selected), Payment, Summary, Order History, Batch Setup/Update, and Batch Summary/Release. The Order Messages tab is active, displaying three text input fields: 'Packing Slip Message:', 'Warehouse Message:', and 'Shipping Label Message:'. Below the Packing Slip Message field is a checkbox labeled 'Show Prices on Packing Slip?' with 'Yes' and 'No' radio buttons. An 'Apply' button is located at the bottom right of the window.

1. To have a message printed on the packing slip, enter the message in the Packing Slip Message field. You can use shortcut keys to enter common expressions.
 2. To request that warehouse personnel provide special handling, enter the instructions in the Warehouse Message field. You can use shortcut keys to enter common expressions.
-  **Note:** The message applies to the selected shipment. To enter a warehouse message for a specific order line, enter the message from the Order Line secondary tab.
3. To indicate whether prices should be printed on the packing slip, select either the Yes or No option.
 4. To have a message printed on the shipping label, enter the message in the Shipping Label Message field. You can use shortcut keys to enter common expressions.
 5. Click **Apply**. The instructions are saved. To determine whether a ship-to address has messages or the show price option, look at the Messages and Show Price fields on the Order Entry primary tab.

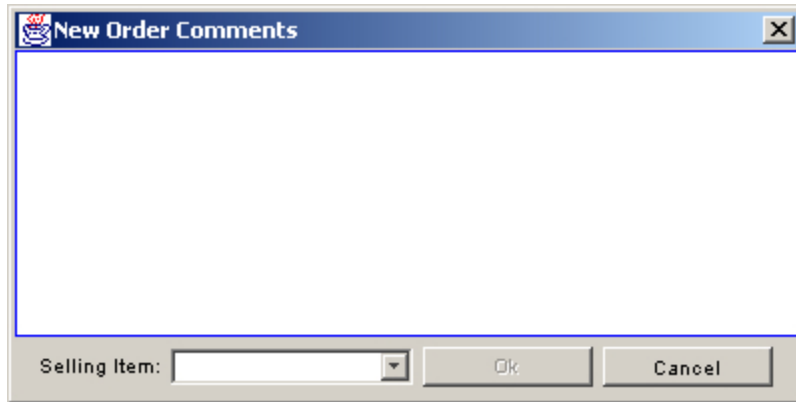
Enter a comment

⇒ **Navigate:** On the Order Entry primary tab, select the Order History secondary tab.



Note: The secondary tabs move to the bottom of the primary tab page.

1. Click **Comments**. The New Order Comments window is displayed.



2. Enter the text of your comment in the text box.
3. [Optional] In the Selling Item field, select the item with which you want to associate the comment.
4. Click **OK**. The comment is saved as an Associate Comments event. It is displayed on the Order Entry primary tab.

Enter payments and accommodations

Overview

Customers can use one or multiple tender types to pay for an order. As you enter each payment, you indicate the monetary amount of the payments. When the order balance reaches zero, you have completed the payment process.

Credit card payments are authorized by an external system. Vouchers and personal checks must be manually authorized. After entering payments that require manual authorization, you must enter an authorization number. If any payments are not authorized when the order is submitted, the order is automatically pended until the authorization issue is resolved.

Should you need to adjust the extended amount for any order line, order subtotal, or order total, you can enter an order line accommodation or order accommodation. You also have the option of canceling a payment.

Procedures

Enter payments

⇒ **Navigate:** On the Order Entry primary tab, select the Payment secondary tab. An order summary appears on the left side of the Payment secondary tab.

1. In the Create Payment block, click the button associated with the method of payment. The payment window appears.
2. Enter the required information in the payment window.
3. Click **Authorize**. The payment is saved. The fields are cleared for entry of another payment.
4. When done entering payments on a payment window, click **Close**.
5. Enter any additional payments until the order balance equals zero.

Manually authorize a payment

⇒ **Navigate:** On the Order Entry primary tab, select the Payment secondary tab. All payments appear on the Order Entry primary tab.

1. Select a payment that has a status of Manual Authorization.
2. Enter the authorization number in the Enter Authorization # field.
3. Click **Authorize**. The status of the payment changes to Manually Approved.

Cancel a payment

- ⇒ **Navigate:** On the Order Entry primary tab, select the Payment secondary tab. All payments appear on the Order Entry primary tab.
1. Select a payment.
 2. Click **Cancel Payment**. The status of the payment changes to Cancelled. The order balance is adjusted.

Enter accommodations

- ⇒ **Navigate:** On the Order Entry primary tab, select the Payment secondary tab. An order summary appears on the left side of the Payment secondary tab.
1. In the Payment Adjustment block, click the button associated with the type of accommodation.
 - **Item Accommodation:** Make an adjustment to an order line.

#	Selling Item	Description	Price
1	239-100353031 Pers/Mono/Gift - Julie...		\$200.00
Tax		0.00	
2	017-100243085 DS Pers- Mono and ...		\$55.00

Tender:

Reason:

Percent Off ☐ Dollar Off ☒

Amount:

Apply To Order Line Close

- **Order Accommodation:** Make an adjustment to the merchandise, service, shipping, or order total. Accommodations can be made at the order level only if all the items on the order are cancelled or shipped.

Order Accommodation

Order Payment Summary

Merchandise	\$280.00
Gifting	\$10.00
Personalization	\$20.00
Shipping	\$12.00
Order Total	\$338.10

Tender:

Reason:

Percent Off ☐ Dollar Off ☒

Amount:

Apply To Order Close

2. In the Order Lines or Order Payment Summary blocks, select the order line or subtotal/total that you want to adjust.
3. In the Tender field, select the method of reimbursement.
4. In the Reasons field, select the reason for the accommodation.
5. Indicate whether the accommodation is based on a percentage (Percent Off) or a monetary amount (Dollar Off).
6. In the Amount field, enter the percentage or monetary amount.
7. Click **Apply to Order Line** or **Apply to Order**. The accommodation is added to the list of payments on the Order Entry primary tab. It also appears in the Promotions/Accommodations block on the Payments secondary tab.
8. Enter any additional accommodations.
9. When done, click **Close**.

Enter a credit card payment

⇒ **Navigate:** On the Order Entry primary tab, select the Payment secondary tab. An order summary appears on the left side of the Payment secondary tab.

1. Click **Credit Card**. The Credit Card Payment window is displayed. If the system has a record of the customer's credit cards, they are listed on the right side of the window.

Type	Account #	Exp Date	First	MI	Last	Suffix
------	-----------	----------	-------	----	------	--------

2. If the credit card already exists in the system, double-click the credit card record on the right side of the window. Otherwise, enter the credit card number in the Account Number field.
3. In the Expiration Date fields, enter or edit the expiration date of the credit card. Enter a two-digit month and a four-digit year.
4. In the Payment Amount field, edit the default amount if necessary.
5. In the Cardholder fields, enter or edit the cardholder's name.
6. [Optional] In the CVV2/CVC2/CID field, enter the security code.
7. Click **Authorize**. The payment is added to the list on the Order Entry primary tab.
8. Enter any additional credit card payments.
9. When done, click **Close**. The Credit Card Payment window is closed.

Enter a voucher payment

⇒ **Navigate:** On the Order Entry primary tab, select the Payment secondary tab. An order summary appears on the left side of the Payment secondary tab.

1. Click **Voucher**. The Voucher Payment window is displayed.

2. In the Tender Type field, select the type of voucher.
3. In the Account Number field, enter the ID of the voucher.
4. In the Payment Amount field, edit the default amount if necessary.
5. Click **Authorize**. The payment is added to the list on the Order Entry primary tab.
6. Enter any additional voucher payments.
7. When done, click **Close**. The Voucher Payment window is closed.
8. Manually authorize the voucher payments.

Enter a personal check payment

⇒ **Navigate:** On the Order Entry primary tab, select the Payment secondary tab. An order summary appears on the left side of the Payment secondary tab.

1. Click **Personal Check**. The Check Payment window is displayed.

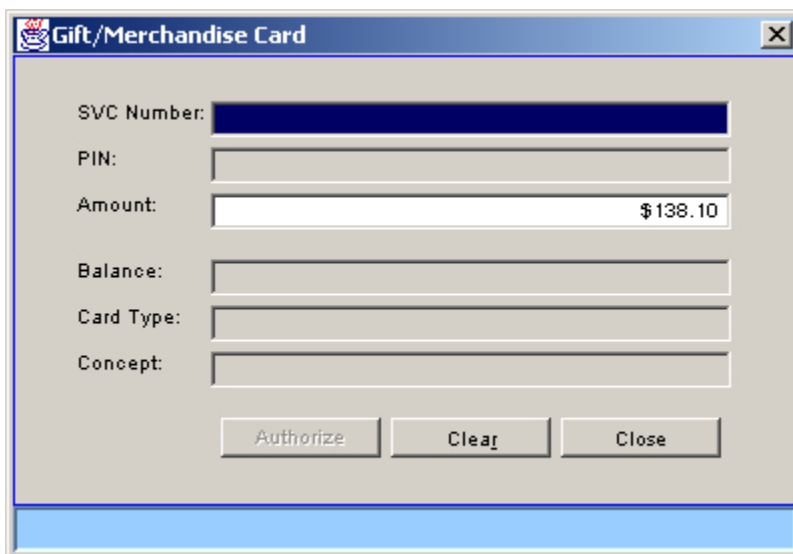
2. In the Check Number field, enter the check number from the customer's personal check.
3. In the Payment Amount field, edit the default amount if necessary.
4. In the Routing Number field, enter the routing number for the customer's financial institution.

5. In the Account Number field, enter the customer's account number from which the check is drawn.
6. Click **Authorize**. The payment is added to the list on the Order Entry primary tab.
7. Enter any additional personal check payments.
8. When done, click **Close**. The Check Payment window is closed.
9. Manually authorize the personal check payments.

Enter a stored value card payment

⇒ **Navigate:** On the Order Entry primary tab, select the Payment secondary tab. An order summary appears on the left side of the Payment secondary tab.

1. Click **Gift/Merch Card**. The Gift/Merchandise Card window is displayed.



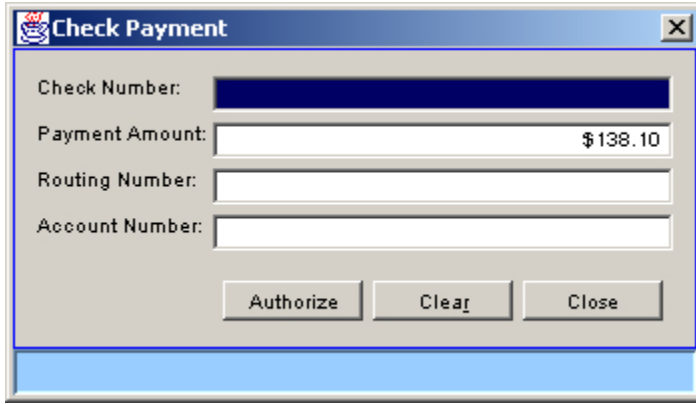
The screenshot shows a software window titled "Gift/Merchandise Card". Inside the window, there are six input fields arranged vertically: "SVC Number" (with a dark blue background), "PIN", "Amount" (showing "\$138.10"), "Balance", "Card Type", and "Concept". At the bottom of the window, there are three buttons labeled "Authorize", "Clear", and "Close".

2. In the SVC Number field, enter the ID of the stored value card.
3. In the PIN field, enter the customer's personal identification number.
4. In the Amount field, edit the default amount if necessary.
5. Click **Authorize**. The payment is added to the list on the Order Entry primary tab.
6. Enter any additional SVC payments.
7. When done, click **Close**. The Gift/Merchandise Card window is closed.

Enter a cash payment

⇒ **Navigate:** On the Order Entry primary tab, select the Payment secondary tab. An order summary appears on the left side of the Payment secondary tab.

1. Click **Cash**. The Check Payment window is displayed.

A screenshot of a 'Check Payment' dialog box. The dialog has a title bar with a blue gradient and a close button (X). Inside, there are four input fields: 'Check Number:' with a dark blue background, 'Payment Amount:' with a white background and a value of '\$138.10', 'Routing Number:' with a white background, and 'Account Number:' with a white background. At the bottom, there are three buttons: 'Authorize', 'Clear', and 'Close'.

2. In the Payment Amount field, edit the default amount if necessary.
3. Click **Authorize**. The payment is added to the list on the Order Entry primary tab.
4. Enter any additional cash payments.
5. When done, click **Close**. The Cash Payment window is closed.
6. Manually authorize the cash payments.

Review and process the order

Overview

After identifying the customer, entering order lines, requesting services, providing shipping and handling instructions, and applying payments and financial accommodations, the order is ready for review and submission.

An invoice is created for each ship-to address/ship method on the order. The invoice includes the ship-to name and address, the order lines, subtotals, and the grand total for the designated ship-to address/ship method. Order-level totals and payments are displayed after the last invoice.

Procedures

Process the order

- ⇒ **Navigate:** On the Order Entry primary tab, select the Summary secondary tab. The invoices and summaries are displayed on the Order Entry primary tab.

The screenshot shows the Retek Customer Order Management interface. The top navigation bar includes tabs: Message Center, Customer Main, Order Entry (selected), Order Main, Activity Request, Work List, Mail Order, Reports, Admin, and Security. Below the navigation bar, the Order Entry primary tab is active, displaying the Summary secondary tab. The interface shows order details for Order Number 121256, Order Type Standard, and Order Status New Order. The order is for a Normal Sale service, with a total of \$311.85. The ship-to address is Petra Greenstreet, 901 Tower Road, FOND DU LAC, WI 54935. The order is for a Normal Sale service, with a total of \$26.25. The interface also displays a table of payments, including a Visa payment of \$100.00, a Personal Check of \$100.00, and a Gift Card of \$138.10. The bottom of the interface shows a navigation bar with tabs: Customer, Order Line, Special Handling, Order Messages, Payment, Summary (selected), and Order History. The Summary tab displays the Order Totals and Payments sections.

Order Totals											
Merchandise Total	\$250.00										
Service Total	\$30.00										
Shipping Total	\$7.00 (Standard - \$5.00, Addl. - \$2.00, Rush - \$0.00)										
Tax Total	\$14.85 (Merch - \$13.00, Service - \$1.50, S&H - \$0.35)										
Accommodations	(\$0.00) (Amount - (\$0.00), Tax - (\$0.00))										
Promotional Savings	(\$0.00)										
Ship-To Total	\$311.85										

Ship-To Daughter (2 of 2)													
Petra Greenstreet, 901 Tower Road, FOND DU LAC, WI 54935													
#	Type	Item Desc.	Created	Qty	Price	Ext Price	Service	Addl. S&H	Line Tax	Status	ECDD	Carrier	Carrier Service
4	Normal Sale	PB SVC.20:Stars		1	\$20.00	\$20.00	\$0.00	\$0.00	\$1.00	Warehouse Reserved	02-03-2004	UPS	Overnight - RCOM

Ship-To Totals			
Merchandise Total	\$20.00		
Service Total	\$0.00		
Shipping Total	\$5.00 (Standard - \$5.00, Addl. - \$0.00, Rush - \$0.00)		
Tax Total	\$1.25 (Merch - \$1.00, Service - \$0.00, S&H - \$0.25)		
Accommodations	(\$0.00) (Amount - (\$0.00), Tax - (\$0.00))		
Promotional Savings	(\$0.00)		
Ship-To Total	\$26.25		

Order Totals			
Merchandise Total	\$250.00		
Service Total	\$30.00		
Shipping Charge	\$12.00		
Tax Total	\$16.10		
Accommodations	(\$0.00)		
Promotional Savings	(\$0.00)		
Order Total	\$338.10		

Payments			
#	Type	Number	Amount
1	Visa	*****2220	\$100.00
2	Personal Check	3524957078	\$100.00
3	Gift Card	5678123407890111	\$138.10



Note: The secondary tabs move to the bottom of the primary tab page.

Determine how you want to process the order:

- To submit the order, click **Submit Order**. The status of the order changes from New Order to Submitted. The order is released to the location where it can be fulfilled.



Note: If certain conditions are not met based on system parameters or fraud rules, the status of a submitted order may be automatically changed to Pending. The order is held until the issues are resolved.

- To manually place the order on hold, click **Pend Order**. You are prompted to provide a reason for the hold. The status of the order changes from New Order to Pending. The order is held until any issues are resolved.
- To cancel the order, click **Cancel Order**. You are prompted to provide a reason for the cancellation. The status of the order changes from New Order to Cancelled. The order is no longer valid, although it is saved for future reference.

Chapter 5 – Order maintenance

Once a new order is submitted, you can no longer access it from Order Entry. If the order was entered as part of a mail order batch, you can not access it from Mail Order seven days after the batch was released. Instead orders are edited under Order Main. You can perform the following order maintenance tasks:

- Look up an order
- Edit order lines
- Request special handling
- Enter messages and comments
- Enter payments and accommodations
- Review historical information
- Review and process the order

Look up an order

Overview

There are multiple ways for you to access a customer order. You can access orders directly on the Order Main primary tab. Or you can access orders indirectly from the Customer Main > Customer History or Work List > Order Worklist tabs.

Procedures

Enter a known order number

⇒ **Navigate:** Select the Order Main primary tab.

1. In the Order Number field, enter an order number.
2. Tab to the next field. The order is retrieved.

Look up an order number for a known customer

⇒ **Navigate:** On the Customer Main primary tab, look up and select a customer. Select the Customer History secondary tab. The events pertaining to the customer are displayed on the Customer History secondary tab.

- Double-click a Create Order event. The system navigates to Order Main and the order is retrieved.

Access a pending order

⇒ **Navigate:** On the Work List primary tab, select the Order Worklist secondary tab. Enter search criteria in the Order Number, Order Task Type, or Order Task Subtype fields. The results are displayed on the Order Worklist secondary tab.

- Double-click the order that you want to access. The system navigates to Order Main and the order is retrieved.

Edit order lines

Overview

Open, pending, and closed orders are edited under the Order Main primary tab. You can cancel order lines that have not yet been shipped. If an order line is not yet fulfilled, you can update it to include personalization, monogramming, and gift services if such services are available for the item. You can also enter special instructions at the order line level.

Once customers receive items, they may request additional service regarding the item, such as the activities described in the following table.

Activity	Description
Cancellation	An order line is cancelled because: <ul style="list-style-type: none"> The customer no longer wants an item that has not yet been shipped. An order line has been entered in error.
Exchange	The customer makes a request to return an item in exchange for a different item. You must enter a return request before you can enter an exchange request.
No Information Return	An unidentified return is matched to an item on an existing order. After the return is matched to the order, it can be processed as a return.
No Original Order Return	The customer makes a request to return an item, but the original order is not known. For example, a gift recipient does not have an order against which the return request can be made. An order with no charges is created for the customer against which the item can be returned.
Partial	The customer requests a part instead of an item. If the part has a selling SKU, you can enter it on the Order Line secondary tab. If it does not have a selling SKU, you would enter the request as a Partial Request under the Activity Request primary tab.
Replacement	The customer makes a request to return an item for another of the same item. The return request is automatically created when you enter the replacement request.
Return	The customer makes a request to return an item in exchange for a refund, a replacement, or a different item. Depending on the value of the item, the customer might not be required to return the item.
Schedule Pickup	The customer makes a request to return or exchange an item. If the value of the item is such that it must be returned, arrangements can be made for a carrier to pick it up from the customer.

Procedures

Enter a return request

Enter a return when the customer asks to return an item for a refund or in exchange for a different item.

- ⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Order Line secondary tab. The order lines are displayed on the Order Main primary tab.
1. Click **Return Order Line**. The Create Return Order Line window is displayed.

Create Return Order Line

Return Item: Pers/Mono/Gift - Ju...
 Return Qty: 1
 Reason:
 Item Number: 049-100353031
 Return Required: Yes ☒ No ☐
 Refund Recipient: Bill To ☒ Ship To ☐
 Andrew M
 950 Nicollet Mall
 Retek on the Mall
 MINNEAPOLIS, MN 55403
 Tender Type:
 Address Book
 Comment:
 Apply Close

2. In the Return Item field, select the item to be returned by the customer.
3. In the Return Qty field, enter the number of units the customer wants to return.
4. In the Reason field, select the reason for the return.
5. To indicate whether the item must be returned, select the Yes or No option.



Note: If the value of the item is above a predefined limit, the customer is required to return the item. If the value is below a predefined limit, you can choose whether to require a return. The status of a required return is Pending Return until the item is received from the customer.

6. In the Tender Type field, indicate how the customer's payment will be refunded.
7. In the Comment field, enter any additional information regarding the request.



Note: Comments are appended to the event recorded in Customer History and Order History.

8. Click **Apply**. The return request is added to the order lines on the Order Main primary tab.
9. Enter any additional return requests.
10. When done, click **Close** to close the window.

Enter a pickup request

You can arrange for a pending return to be picked up by a carrier. The pickup request option is not available until a return or an exchange has been entered on the order.

⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Order Line secondary tab. The order lines are displayed on the Order Main primary tab.

1. Select an order with a status of Pending Return.
2. Click **Schedule Pickup**. The Schedule Pickup window is displayed.

Order Number: 95416

Selling Sku	Description	Quantity	Price	Ext. Price
100353049	Pers/Mono/Gift - Julie 2:Cera...	1	\$63.22	\$55.56

Customer Name: Andrew M

Address 1: 8484 Street

Address 2:

Address 3:

City: SCHENECTADY

Zip Code: 12345 State: NY

Day Phone: (612) 321-3212

Evening Phone: (612) 321-3212

Email: mail@mail.com

Address Book

Carrier: UPS

Number of Boxes: 1

Comment:

Apply Close

3. In the Selling SKU block, select the item that will be picked up.
4. If the default pickup location is incorrect, click **Address Book**. Enter or select another address in the Address Book window. Then click **Use**. The selected address replaces the default address on the Schedule Pickup window.

5. In the Carrier field, select the carrier who will provide the service.
6. In the Comment field, enter any additional information.



Note: Comments are appended to the event recorded in Customer History and Order History.

7. Click **Apply**. The request for pickup is routed to where it will be processed.
8. Schedule any additional pickups.
9. When done, click **Close** to close the window.

Enter an exchange request

Enter an exchange request when the customer requests a different item in exchange for a pending return. The exchange request option is not available until a return has been entered on the order.

⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Order Line secondary tab. The order lines are displayed on the Order Main primary tab.

1. Click **Exchange Order Line**. The Exchange Order Line window is displayed.

2. In the Selling Item field, enter the selling item number of the item requested by the customer.



Note: To look up an item, you can click **Item Search** on the Exchange Order Line window.

3. In the description fields, select the characteristics of the item.
4. In the Quantity field, enter the number of units requested by the customer.
5. For an eligible item, enter personalization, monogramming, or gift services as requested by the customer.
6. Enter any instructions for warehouse personnel if necessary.
7. In the Shipping Info fields, edit the default recipient, carrier service, and carrier as necessary.

8. Click **Apply**. The exchange request is added to the order lines on the Order Main primary tab.
9. Enter any additional exchange requests.
10. When done, click **Close** to close the window.

Enter a replacement request

Enter a replacement request if the customer requests the same item in exchange for an item to be returned. The replacement request creates both the return request and the new sale.

⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Order Line secondary tab. The order lines are displayed on the Order Main primary tab.

1. Click **Replacement Order Line**. The Replacement window is displayed.

Replacement

New Item

Replace Item: Pers/Mono/Gift - Julie 2: Ceramic

Selling Item: 049-100353031

Finish of Product: Ceramic

Quantity: 1

Price: \$55.56

Extended Price: \$55.56

Return Required: Yes ☒ No ☐

Fulfill Immediately: Yes ☐ No ☒

Reason: Damaged

Order Comments

Additional Line Info

Item Status: New Order Line

ECDD: In Stock

Reserved Qty: 1

Backordered Qty: 0

Backorder Notice To Ship-To ☐

Shipping Info

Address Book: NYState

Carrier Service: Overnight - RCOM

Carrier: UPS

Add'l Delivery Charges: \$1.00

Apply Close

2. In the Selling Item field, select the item that the customer wants to replace.
3. To indicate whether the item must be returned, select the Yes or No option.



Note: If the value of the item is above a predefined limit, the customer is required to return the item. If the value is below a predefined limit, you can choose whether to require that an item be returned. The status of a required return is Pending Return until the item is received from the customer.

4. If the return is required, indicate whether the replacement item should be sent immediately or after the return is received.
5. In the Reason field, select the reason for the replacement request.
6. In the Quantity field, enter the number of units the customer intends to replace.

7. For an eligible item, enter personalization, monogramming, or gift services as requested by the customer.
8. Enter any instructions for warehouse personnel if necessary.
9. In the Order Comments field, enter any additional information regarding the request.



Note: Comments are appended to the event recorded in Customer History and Order History.

10. If the customer orders an item for delivery to someone else and the item is backordered, the Backorder Notice to Ship-To check box is enabled. Select the check box if the customer wants a backorder notice sent to the recipient.
11. In the Shipping Info fields, edit the default recipient, carrier service, and carrier as necessary.
12. Click **Apply**. A pending return and a reserved or backordered order line are added to the order lines on the Order Main primary tab.
13. Enter any additional replacement requests.
14. When done, click **Close** to close the window.

Enter a partial request

Enter a partial request when the customer requests a part rather than an item. To enter a partial request on the Order Main tab, the partial item must have a SKU. If the partial item does not have a SKU, navigate to the Activity Requests tab to enter the request.

⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Order Line secondary tab. The order lines are displayed on the Order Main primary tab.

1. Click **Partial Order Line**. The Create Partial Order Line window is displayed.

Create Partial Order Line

Partial Line Info

Selling Item:

Description:

Description:

Description:

Description:

Description:

Quantity:

Price:

Extended Price:

Reason Code:

Additional Line Info

Item Status:

ECDD:

Reserved Qty:

Backordered Qty:

Backorder Notice to Ship-to ☐

Shipping Info

Address Book

Service Level:

Carrier:

Add'l Delivery Charge:

Generic SKU Description:

Comment:

2. In the Selling Item field, enter the selling item number of the partial item requested by the customer.
3. In the description fields, select the characteristics of the part.
4. In the Quantity field, enter the number of units requested by the customer.
5. In the Reason field, select the reason for the request.

6. If the customer orders a part for delivery to someone else and the part is backordered, the Backorder Notice to Ship-To check box is enabled. Select the check box if the customer wants a backorder notice sent to the recipient.
7. In the Shipping Info fields, edit the default recipient, carrier service, and carrier as necessary.
8. Enter any special instructions for warehouse personnel in the Generic SKU Description field.
9. In the Comment field, enter any additional information regarding the request.



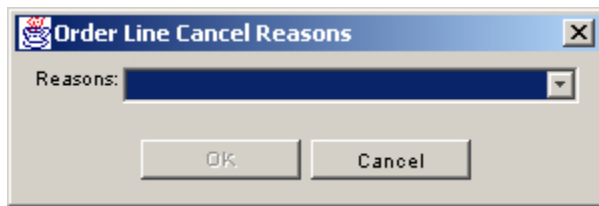
Note: Comments are appended to the event recorded in Customer History and Order History.

10. Click **Apply to Order**. The partial request is added to the order lines on the Order Main primary tab.
11. Enter any additional partial requests.
12. When done, click **Close** to close the window.

Cancel an order line

⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Order Line secondary tab. The order lines are displayed on the Order Main primary tab.

1. Select the order line to be cancelled.
2. Click **Cancel Order Line**. The Order Line Cancel Reasons window is displayed.

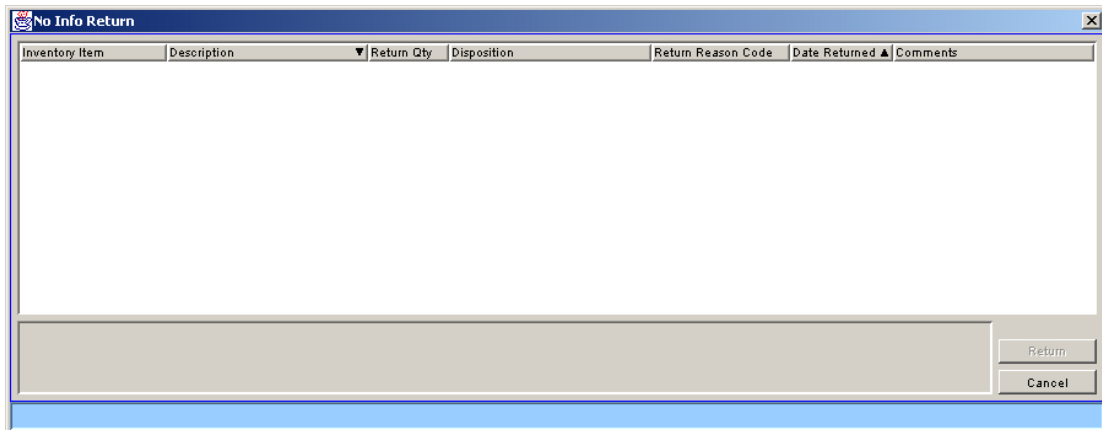


3. In the Reasons field, select the reason for the cancellation.
4. Click **OK**. Depending on the status of order line, either the status changes to Cancelled or the order line is removed.

Resolve a no information return

A customer may return an item without authorization or without sufficient identification as to who the customer is. Should the customer inquire about the return, you can look up the customer order and match the unidentified return with the customer's order.

- ⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Order Line secondary tab. The order lines are displayed on the Order Main primary tab.
1. Select the order line that you want to match with a return.
 2. Click **No Info Return**. If items matching the customer inquiry were received, they appear on the No Info Return window.



Inventory Item	Description	Return Qty	Disposition	Return Reason Code	Date Returned	Comments
----------------	-------------	------------	-------------	--------------------	---------------	----------

3. Select the item that matches the selected order line.
4. Click **Return**. The unidentified return is matched to the item on the customer's order. The order is updated to reflect the return.

Enter a dummy order for returns or partial item orders

Enter a dummy order for customers who want to return items that they received as gifts.

⇒ **Navigate:** Look up and retrieve a customer or enter a new customer under the Customer Main primary tab. On the Order Main primary tab, select the Order Line secondary tab.

1. Click **No Original Order Return**. The No Original Order Return window is displayed.

2. In the Item # field, enter the selling item number of the item that was shipped to the customer.
3. In the description fields, select the characteristics of the item.
4. In the Quantity field, enter the number of units to be returned.
5. For an eligible item, enter personalization or monogramming services if they were originally applied to the item.
6. Click **Apply**. An order line in Shipped status is displayed on the Order Main primary tab.
7. Enter any additional order lines.
8. When done, click **Close** to close the window. You can then enter the customer's request to return, exchange, or replace an item or order a partial item.

Request special handling

Overview

For items that have not yet been shipped to the customer, you can enter or remove special handling requests. This includes indicating which items should be shipped and wrapped together or placing a hold on a shipment.

Procedures

Request that items be processed together

- ⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Special Handling secondary tab. The ship-to addresses are displayed on the Order Main primary tab.
1. Select a ship-to address. The order lines for the selected ship-to address are displayed on the Special Handling secondary tab.

Selling Item	Description	ECDD	Direct Ship	P.T.	W.T.	Wrap Type	Wrap Price	Card Type	Card Price	Event Hold	Date Hold
180-100237241	Care Card Large	11-17-2003	<input type="checkbox"/>				\$0.00		\$0.00		
180-100237030	Nightstands Large White:1...	11-17-2003	<input type="checkbox"/>				\$0.00		\$0.00		
180-100242031	Personalization Direct Shi...	11-17-2003	<input checked="" type="checkbox"/>				\$0.00		\$0.00		

Process Together Wrap Together Event Hold Date Hold Clear

2. To request that items be shipped together:
 - a. Select two or more order lines.
 - b. Click **Process Together**. Notice in the PT column that the same character appears for each of the selected order lines. This indicates that the order lines must be processed together.



Note: If the order lines have different estimated customer delivery dates (ECDD), they are all updated to the latest ECDD.

3. To request that items be gift wrapped together:
 - a. Select two or more order lines.
 - b. Click **Wrap Together**. Notice in the WT column that the same character appears for each of the selected order lines. This indicates that the order lines must be wrapped together.

Place a hold on items

- ⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Special Handling secondary tab. The ship-to addresses are displayed on the Order Main primary tab.
1. Select a ship-to address. The order lines for the selected ship-to address are displayed on the Special Handling secondary tab.
 2. Indicate whether the customer wants to delay a shipment due to a special event:
 - **Predefined event:** Select one or more order lines. Click **Event Hold**. The Event Hold window is displayed. Select the event. Click **Apply**. The event appears in the Event Hold field for the selected items.

- **Customer-defined date:** Select one or more order lines. Click **Date Hold**. The Personal Hold window is displayed. Enter a date, or click **Cal** and select a date. Click **Apply**. The date appears in the Date Hold field for the selected items.



Note: The estimated customer delivery dates are updated accordingly.

Clear special handling requests

- ⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Special Handling secondary tab. The ship-to addresses are displayed on the Order Main primary tab.
1. Select a ship-to address. The order lines for the selected ship-to address are displayed on the Special Handling secondary tab.
 2. Select one or more order lines.
 3. Click **Clear**. The special handling instructions applied to the items are cleared.

Enter messages and comments


Overview

You can enter messages that will appear on documents made available to customers (packing slip), warehouse personnel (pick instructions), and carriers (shipping labels), if the items have not yet been shipped.

Procedures

Enter messages

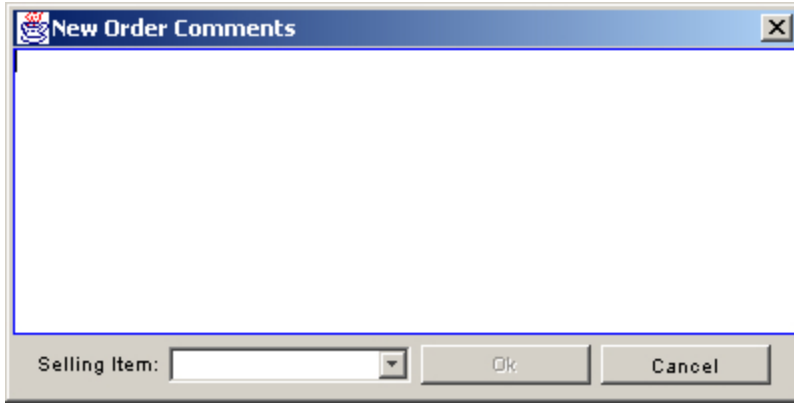
⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Order Messages secondary tab. The ship-to addresses are displayed on the Order Main primary tab. Select the ship-to address that you want to process.

1. To have a message printed on the packing slip, enter the message in the Packing Slip Message field. You can use shortcut keys to enter common expressions.
 2. To request that warehouse personnel provide special handling, enter the instructions in the Warehouse Message field. You can use shortcut keys to enter common expressions.
-  **Note:** The message applies to the selected shipment. To enter a warehouse message for a specific order line, enter the message on the Order Line secondary tab.
3. To indicate whether prices should be printed on the packing slip, select either the Yes or No option.
 4. To have a message printed on the shipping label, enter the message in the Shipping Label Message field. You can use shortcut keys to enter common expressions.
 5. Click **Apply**. The instructions are saved. To determine whether a ship-to address has messages or the show price option, look at the Messages and Show Price fields on the Order Main primary tab.

Enter a comment

⇒ **Navigate:** Look up an order. On the Order Maintenance primary tab, select the Order History secondary tab.

1. Click **Comments**. The New Order Comments window is displayed.



2. Enter the text of your comment in the text box.
3. [Optional] In the Selling Item field, select the item with which you want to associate the comment.
4. Click **OK**. The comment is saved as an Associate Comments event. Events are viewable when an order is retrieved on the Order Main > Order History tab.

Enter payments and accommodations

Overview

You may need to reconcile payments when changes are made to an order. If the order balance is greater than the amount tendered by the customer, the customer must provide additional payment. On the other hand, if the order balance is less than the amount tendered, you may need to process a refund for the customer. Refunds are automatically calculated when you enter an overpayment from the customer during order entry or after a mail order batch is processed. Refunds are also automatically calculated when you enter a return, replacement, exchange, or cancellation for the customer during order maintenance.

When possible refunds are paid to the customer using the same tender type provided by the customer. The exceptions are that a payment by gift certificate is refunded by merchandise voucher and cash payments are refunded by check. If the customer used multiple tender types, the refund is paid in the following order:

1. **Credit card:** The debited amount can be for no more than the original amount paid by credit card.
2. **Check:** The refunded amount can be for no more than the original amount paid by personal check. Cash payments are also refunded by check.
3. **Merchandise voucher:** The balance of the refund not covered by credit card or check is refunded by merchandise voucher. If the balance is less than a predefined amount, it is paid by check.

Adjustments can be made to payments in order to promote goodwill. Such accommodations may be a fixed amount or a percentage of an order line, order subtotal, or the order total amount. Accommodations at the order line level can be made only to shipped or cancelled items.

Procedures

Enter payments

- ⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Payment secondary tab. An order summary appears on the left side of the Payment secondary tab. Promotions and accommodations are displayed on the right side. If any previous activities caused the order balance to change, the automatically calculated refunds are displayed on the Order Main primary tab.

The screenshot displays the 'Payment' secondary tab within the 'Order Main' primary tab. The interface is divided into four main sections:

- Order Totals:** A list of charges and payments.

Merchandise:	\$181.06
Personalization:	\$2.25
Gifting:	\$0.00
Subtotal:	\$183.31
Standard Shipping:	\$15.00
Additional Charges:	\$21.00
Rush Shipping:	\$0.00
Shipping Total:	\$36.00
Merchandise Tax:	\$12.95
Shipping Tax:	\$2.56
Service Tax:	\$0.17
Tax Total:	\$15.68
Accommodations:	(\$0.00)
Promotional Savings:	(\$0.00)
Order Total:	\$234.99
Applied Payments:	\$0.00
Order Balance:	\$234.99
- Manual Authorization:** Includes a field for 'Enter Authorization #' and an 'Authorize' button.
- Create Payment:** A vertical stack of buttons for different payment methods: Credit Card, Voucher, Personal Check, Gift/Merch Card, Money Order, and Cash.
- Payment Adjustment:** Includes buttons for 'Cancel Payment', 'Item Accommodation', and 'Order Accommodation'.
- Promotions / Accommodations:** A table showing applied adjustments.

Type	Description	Amount
Accommodation	Tax - Tax Credit	(\$0.37)

1. To cancel a payment:



Note: You can not cancel a payment in the following statuses: Pre-settled, Settled, Cancelled, and Manually Approved.

- a. Select a payment.
 - b. Click **Cancel Payment**. The payment changes to Cancelled and the order balance is adjusted.
2. To add a payment:
 - a. In the Create Payment block, click the button corresponding to the tender type. The payment window appears.
 - b. Enter the required information in the payment window.
 - c. Click **Authorize**. The payment is saved and the fields are cleared for entry of another payment.
 - d. When done entering payments on the payment window, click **Close**.
 3. To authorize a payment that requires manual authorization:
 - a. Select a payment.
 - b. Enter the authorization number in the Enter Authorization # field.
 - c. Click **Authorize**. The status of the payment changes to Manually Approved.

Enter order line accommodations

⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Payment secondary tab. An order summary appears on the left side of the Payment secondary tab. Promotions and accommodations are displayed on the right side. Payments and refunds are displayed on the Order Main primary tab.

1. In the Payment Adjustment block, click **Item Accommodation**. The Order Line Accommodation window is displayed.

#	Selling Item	Description	Price
1	049-100353031	Pers/Mono/Gift - Julie...	\$55.56
Tax		4.79	
2	049-100237208	Pers with Gifting:Med...	\$18.99

Tender:

Reason:

Percent Off ☐ Dollar Off ☒

Amount:

Apply To Order Line Close

2. In the Order Lines block, select an order line.
3. In the Tender field, select the method of reimbursement.
4. In the Reason field, select the reason for the accommodation.
5. Indicate whether the accommodation is based on a percentage (Percent Off) or a monetary amount (Dollar Off).
6. In the Amount field, enter the percentage or monetary amount.
7. Click **Apply to Order Line**. The accommodation is added to the list of payments. It is also added to the list of promotions and accommodations on the Payments secondary tab.
8. Enter any additional accommodations.
9. When done, click **Close**.

Enter order accommodations

- ⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Payment secondary tab. An order summary appears on the left side of the Payment secondary tab. Promotions and accommodations are displayed on the right side. Payments and refunds are displayed on the Order Main primary tab.
1. In the Payment Adjustment block, click **Order Accommodation**. The Order Accommodation window is displayed.

Order Payment Summary	
Merchandise	\$178.28
Gifting	\$0.00
Personalization	\$2.25
Shipping	\$36.00
Tax	\$15.68
Order Total	\$232.21

Tender: Visa ****4242

Reason:

Percent Off ☐ Dollar Off ☒

Amount:

Apply To Order Close

2. In the Order Payment Summary block, select a subtotal or the order total.
3. In the Tender field, select the method of reimbursement.
4. In the Reason field, select the reason for the accommodation.
5. Indicate whether the accommodation is based on a percentage (Percent Off) or a monetary amount (Dollar Off).
6. In the Amount field, enter the percentage or monetary amount.
7. Click **Apply to Order**. The accommodation is added to the list of payments. It is also added to the list of promotions and accommodations on the Payments secondary tab.
8. Enter any additional accommodations.
9. When done, click **Close**.

Review historical information

Overview

You can review historical information pertaining to specific parts of an order. This includes:

- **Shipment history**
You can track the shipped order lines on the current order. Shipment confirmations are provided by a warehouse management system (WMS) and by direct ship suppliers. Tracking IDs and proofs of delivery are provided by carriers.
- **Payment history**
You can review all payment authorization attempts and accommodations for the current order.
- **Order history**
You can review all of the events that have been entered for the current order. Such events concern changes to the status of the order and order lines, correspondence sent to the customer, and comments appended to the order.

Procedures

Track shipments

- ⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Shipment History secondary tab. Any shipments are displayed on the Order Main primary tab.
- Select the shipment that you want to review. The contents of the shipment are displayed on the Shipment History secondary tab.

The screenshot displays the Retek Customer Order Management interface. The top navigation bar includes tabs: Message Center, Customer Main, Order Entry, Order Main (selected), Activity Request, Work List, Mail Order, Reports, Address, and Security. Below this, the Order Main primary tab is active, showing a table of order lines. The table has columns: Ship Date, Expected Receipt Date, Carrier, Order Status, Tracking ID, Delivery Confirmation, No. of Bolls, Weight (Lbs), Volume (Lbs), and Ship Number. Two rows are visible, both with a status of 'Shipped - RCOM'. The bottom section of the interface shows the Shipment History secondary tab, which is currently empty. The bottom navigation bar includes tabs: Customer, Order Line, Special Handling, Order Message, Payment, Payment History, Shipment History (selected), Summary, Order History, and Worklist. The bottom section also displays a table with columns: Setting Item, Item Description, Qty, Original EOE, Fulfilling Warehouse, Return Warehouse, and Warehouse Name.

Review payment history

- ⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Payment History secondary tab. All payment authorization attempts are displayed on the Order Main primary tab.
- To view the contents of a shipment, select a pre-settled or settled payment that has a ship date. The shipped items are displayed on the Payment History secondary tab. Subtotals and totals for the shipment are displayed below the list of items.

The screenshot shows the 'Payment History' tab for order 95416. The top section lists transactions with columns for Transaction Date, Transaction Type, Tender Type, Tender Details, Amount, No. of Shipments, and Ship Date. The bottom section shows a list of items with columns for Selling Item, Item Description, Qty, Ext. Price, Add S/H, Tax, PZ Services, and Gift Services. A summary section at the bottom right shows the Grand Total and various fees.

Transaction Date	Transaction Type	Tender Type	Tender Details	Amount	No. of Shipments	Ship Date
11-21-2003 4:34 PM C...	APPROVED	Visa	*****4242	\$97.17		
11-24-2003 4:07 PM C...	APPROVED	Visa	*****4242	(\$0.37)		
11-24-2003 4:07 PM C...	SETTLED	Visa	*****4242	(\$0.37)		
12-18-2003 9:49 AM C...	SETTLED	Visa	*****4242	\$97.17	2	11-21-2003 12...
02-04-2004 2:46 PM C...	PRE SETTLED	Visa	*****4242	(\$98.80)		
02-04-2004 2:46 PM C...	APPROVED	Visa	*****4242	(\$98.80)		
02-04-2004 2:49 PM C...	APPROVED	American Express	*****0004	\$234.99		
02-04-2004 2:55 PM C...	APPROVED	American Express	*****0004	(\$2.78)		

Selling Item	Item Description	Qty	Ext. Price	Add S/H	Tax	PZ Services	Gift Services
100237208	Pez with Gifting:Medium	1	\$18.99	\$1.50	\$2.34	\$0.75	\$4.99
100353031	Pez/MonoGift - Julie 2:Ceramic	1	\$55.56	\$1.00	\$4.41	\$2.25	\$0.00

Grand Total: \$98.80	Merch \$74.55	Shipping \$7.50	Taxes \$7.13	PZ \$3.00	Gift Wrap \$4.99
	Addtl S/H: \$2.50	Standard S/H: \$5.00	Rush S/H: \$0.00		

The status of the payment varies depending on where it is in the settlement cycle. The following table describes the payment statuses (status is also referred to as transaction type and authorization status).

Status	Description
Approved	<ul style="list-style-type: none"> The validation process determined that the payment was valid and the requested amount is available. This applies to credit cards only. Refunds are automatically approved.
Authorization Failed	The validation process failed before determining whether the payment should be approved.
Authorizing	The validation process has not yet determined whether a payment is valid. This applies to credit cards only.
Cancelled	The payment or refund was cancelled by an associate. This applies to all payment methods.

Status	Description
Declined	The validation process determined that the payment was invalid. This applies to credit cards only.
Expired	The validation process determined that the payment was invalid. This applies to tender types that have passed their expiration date.
Fraud	The validation process determined that the payment might be fraudulent based on preset fraud parameters.
Manual Authorization	The validation process must be performed manually.
Manually Approved	The validation process was performed manually. The payment was approved.
Pre-Settled	<ul style="list-style-type: none">• Items were shipped to the customer, but the payment is not yet settled.• Items were returned to the warehouse, but the refund is not yet settled.
Referral	The associate must contact the credit card provider for resolution.
Settled	<ul style="list-style-type: none">• Items were shipped to the customer, and payment was received for the shipment.• Returned items were received at the warehouse, and the refund was sent to the customer.

Review and update the order history

⇒ **Navigate:** Look up an order. On the Order Main primary tab, click the Order History secondary tab.

- Any events associated with the order are displayed on the Order Main primary tab.

Message Center Customer Main Order Entry **Order Main** Activity Request Work List Mail Order Reports Admin Security

Order Number: 95416 Type: Standard Status: Closed Cancel Pending Order Date: Cui Priority: Low Cancel Order

Pending Reason:

Date/Time	User	Event Type	Event Details
11-24-2003 4:07 PM CST	validuser(Las Vegas)	Customer Accommodation	A customer accommodation of \$0.37 was created on 11-24-2003. Reason = Tax Credit
11-24-2003 4:07 PM CST	validuser(Las Vegas)	Customer Accommodation	A customer accommodation of \$0.37 was created on 11-24-2003. Reason = Tax Credit
11-21-2003 4:37 PM CST	sys	Closed Order	Order #95416 was closed on 11-21-2003
11-21-2003 4:37 PM CST	sys	Customer Correspondence	Ship Confirmation was created and sent to customer via Email for order number 95416 and sku number 100353099
11-21-2003 4:36 PM CST	sys	Customer Correspondence	Ship Confirmation was created and sent to customer via Email for order number 95416 and sku number 100353099
11-21-2003 4:35 PM CST	validuser(Las Vegas)	Create Order	Order #95416 was created on 11-21-2003
11-21-2003 4:35 PM CST	sys	Customer Correspondence	Order Confirmation was created and sent to customer via Both for order number 95416 and sku numbers 100353099, 100237224

Comments

Customer Order Line Special Handling Order Messages Payment Payment History Shipment History Summary **Order History** Worklist

Review and process the order

Overview

After making any changes to the order, you can review and submit the order.

An invoice is displayed for each ship-to address/ship method. The invoice includes the ship-to name and address, the order lines, subtotals, and the grand total for the designated ship-to address/ship method. Order-level totals and payments are displayed after the last invoice.

Procedures

Process the order

- ⇒ **Navigate:** Look up an order. On the Order Main primary tab, select the Summary secondary tab. The invoices and summaries are displayed on the Order Main primary tab.

The screenshot shows the 'Summary' tab of the Order Main primary tab. The order number is 95416, status is Closed, and priority is Low. The summary view is set to 'Current Order Detail'. The order is for Andrew M Mogendoff, 8484 Street, SCHENECTADY, NY 12345.

#	Type	Item Desc.	Created	Qty	Price	Ext Price	Service	Addl. S&H	Line Tax	Status	ECDD	Carrier	Carrier Service
1	Normal Sale	Pez/Mono/Gift - Julie 2: Ceramic	11-21-2003	1	\$55.56	\$55.56	\$2.25	\$1.00	\$4.41	Shipped	11-21-2003	UPS	Overnight - RCOM
	SERVICE	Monogram - tam					\$2.25						
	ACCOM	Merchandise - Scratched					(\$2.78)						
2	Normal Sale	Pez with Gifting: Medium	11-21-2003	1	\$18.99	\$18.99	\$5.74	\$1.50	\$2.34	Shipped	11-21-2003	UPS	Ground RCOM
	SERVICE	Gift Wrap - Baby Gift Wrap					\$4.99						
	SERVICE	Monogram - tam					\$0.75						
	ACCOM	Tax - Tax Credit					(\$0.37)						
3	Exchange Return	Pez with Gifting: Medium		(1)	\$18.99	(\$18.99)	(\$0.75)	(\$1.50)	(\$1.97)	Pending Return			
	SERVICE	Gift Wrap - Baby Gift Wrap					(\$4.99)						
	SERVICE	Monogram - tam					(\$0.75)						
	ACCOM	Tax Adjustment					\$0.37						

Ship-To Totals

Merchandise Total	\$55.56
Service Total	\$2.25
Shipping Total	\$6.00 (Standard - \$5.00, Addl. - \$1.00, Rush - \$0.00)
Tax Total	\$4.79 (Merch - \$4.16, Service - \$0.17, S&H - \$0.46)
Accommodations	(\$2.78) (Amount - (\$2.78), Tax - (\$0.00))
Promotional Savings	\$0.00
Ship-To Total	\$65.82

Ship-To Return Totals

Merchandise Total	(\$18.99)
Service Total	(\$5.74)
Shipping Total	(\$1.50) (Standard - (\$0.00), Addl. - (\$1.50), Cust Rtn - (\$0.00))
Tax Total	(\$2.34) (Merch - (\$1.80), Service - (\$0.43), S&H - (\$0.11))
Accommodations	\$0.37 (Amount - \$0.00, Tax - \$0.37)
Promotional Savings	\$0.00
Ship-To Return Total	(\$28.20)

Order Totals

Merchandise Total	\$181.06
Service Total	\$2.25
Shipping Charge	\$36.00
Tax Total	\$15.68
Accommodations	(\$2.78)
Promotional Savings	\$0.00
Order Total	\$232.21

Order Return Totals

Merchandise Total	(\$18.99)
Service Total	(\$5.74)
Shipping Total	(\$1.50)
Tax Total	(\$2.34)
Accommodations	\$0.37
Promotional Savings	\$0.00
Order Return Total	(\$28.20)

Payments

#	Type	Number	Amount
1	Visa	*****4242	(\$0.37)
2	American Express	*****0004	(\$2.78)
3	Visa	*****4242	\$97.17
4	American Express	*****0004	\$138.19
5	Visa	*****4242	(\$96.80)
6	Visa	*****4242	(\$0.37)

Buttons: **Pend Order**, **Submit Order**

Bottom tabs: Customer, Order Line, Special Handling, Order Messages, Payment, Payment History, Shipment History, **Summary**, Order History, Worklist

Determine how you want to process the order:

- To submit the order, click **Submit Order**. The status of the order changes to Open. The order is released to the location where it can be fulfilled.



Note: If certain conditions are not met based on system parameters or fraud rules, the status of a order may be automatically changed to Pending. The order is held until the issues are resolved.

- To manually place the order on hold, click **Pend Order**. You are prompted to provide a reason for the hold. The status of the order changes to Pending. The order is held until any issues are resolved.

- To cancel the order, click **Cancel Order**. You are prompted to provide a reason for the cancellation. The status of the order changes to Cancelled. The order is no longer valid, although it is saved for future reference.

Chapter 6 – Customer service

Besides placing orders, customers may request additional services. Customers may want additional information about a product. They may want you to research an issue regarding a past order. Some orders are pended, either systematically or manually, due to missing information or possible fraud. Such orders must be researched and either released after the issues are resolved or cancelled if fraudulent. As an associate, you can enter personal reminders in order to track activities that require follow-up.

You can perform the following customer service tasks:

- Look up and research items
- Enter and resolve activity requests
- Review and resolve pended orders
- Enter and resolve personal reminders

Look up and research items

Overview

You can use a variety of search criteria in order to find a particular item or a group of items that share some characteristic. In the On Hand column, you can determine the availability of the item.

Searches are not case sensitive. You can use either lowercase, uppercase, or mixed case letters in the text fields. Wildcard searches are also applicable.

When looking up an item, you can view additional information about the item on other tabs in the Item Search/Product Information window. You can also see which media exist for the current concept or for all concepts.

Procedures

Look up items

⇒ **Navigate:** On the application toolbar, click Item Search. The Item Search/Product Information window is displayed.

1. On the Search tab, enter search criteria in one or more of the search criteria fields.
2. Click **Search**. The results are displayed above the search criteria.



Note: If you want to cancel a search before the results are displayed, click **Cancel**.

3. To place an item on the current order:
 - a. Navigate to the Order Line secondary tab on the Order Entry or Mail Order primary tab.
 - b. Select an item from the results list on the Item Search/Product Information window.
 - c. Click **Apply**. The item is entered on the Order Line secondary tab.

4. To clear the results and the search criteria, click **Clear**. You can then enter criteria for another search.
5. When done, click **Close** to close the Item Search/Product Information window.

Wildcard searches

Wildcard searches are permitted when looking up selling items. The wildcard is an asterisk (*). You can place the asterisk before, after, or between one or more characters. You must enter at least one character in addition to the asterisk. Some examples of wildcard searches include:

- Enter night* in the Item Description field to retrieve items described as Nightstands.
- Enter *999 in the Department field to retrieve all selling items associated with departments 1999, 2999, and 3999.
- Enter 1*cup in the Item Description field to retrieve selling items described as 12 oz cup and 16 oz cup.



Note: When searching by selling item number you must enter at least the first four digits of the selling item number. The first three digits represent the media code.

Look up an item's status

⇒ **Navigate:** On the Item Search/Product Information window, look up and select an item. Click the Item Details tab.

The screenshot shows the 'Item Search / Product Information' window with the 'Item Details' tab selected. The window is divided into several sections:

- Item Availability:** Fields for 'Estimated Delivery Date' and 'Quantity on Backorder'. A status indicator shows 'No Longer Available'.
- Item Shipping Information:** Fields for 'Default Carrier Service' (Ground RCM) and 'Shipping Restrictions' (Address, CTRY, POB, POBEX, POBEX).
- Employee Discount:** Fields for 'Employee Discount' (40%) and 'Sale' (20%).
- Associated Online Messages:** A list of messages with columns for Media Code, Media Description, Channel, Page, Effective Date, Expiration Date, and Price.

The 'Associated Online Messages' table contains the following data:

Media Code	Media Description	Channel	Page	Effective Date	Expiration Date	Price
100	January Online Media	Web and Monitor		01-01-2003	01-01-2004	\$0.00
102	January Online Media	Web and Monitor		07-11-2003	07-11-2004	\$0.00
114	January Online Media	Web and Monitor		05-05-2003	05-04-2004	\$0.00
117	July Direct Ship Media	Web and Monitor		05-07-2003	05-06-2004	\$0.00

You can view the following details regarding the status of an item.

Detail	Description
Availability	Provides the earliest estimated customer delivery date and the backordered quantity. If applicable, indicates whether the item is a direct ship item or no longer available.
Shipping	Lists the default carrier service and shipping restrictions.
Employee discount	Lists the discount percentage that would be applied to the regular price and to the sale price of the item.
Purchase orders	Click View POs to see a list of active purchase orders containing the item or the component items of a pack item. POs for direct ship items are not included in the list.
User-defined attributes (UDA)	Click View UDAs to see a list of user-defined attributes associated with the item.
Components	Click View Components to see a list of the component items that make up a pack item.
Online messages	Lists the online messages, by media, that pertain to the item. These are the pop-up, product messages that have been set up for the item.
Options	Click the personalization, monogramming, and gift icons to see the value-added services associated with the item.
Media	Lists the media in which the item is featured.

Look up product information

⇒ **Navigate:** On the Item Search/Product Information window, look up and select an item. Click the Product Information tab.

Item Search / Product Information

Search Item Details Media Codes **Product Information**

Item: 100237144 Differentiator 1: Size Differentiator 3: Color
 Item Description: Nightstands: Small:Black2 Feet: Ceramic Differentiator 2: Size Type 2 Differentiator 4: Finish of Product

Attribute ▼ Product Information

U_CARE_INSTRUCT_IND	
U_COLLECTION	
U_CONSTANT_DIMENSION_FLAG	false
U_HANDLING_SENSITIVITY_CODE	
U_ITEM_DESCRIPTION	Nightstands
U_ITEM_GRANDPARENT_ID	
U_STANDARD_DELIVERY_CHARGE_FLAG	true

Dynamic Product Information

U_TAX_CLASSIFICATION ▼ LSM Custom Attributes 001 ▼
 8.25% Extra knobs can be ordered separately for the nightstand drawers.

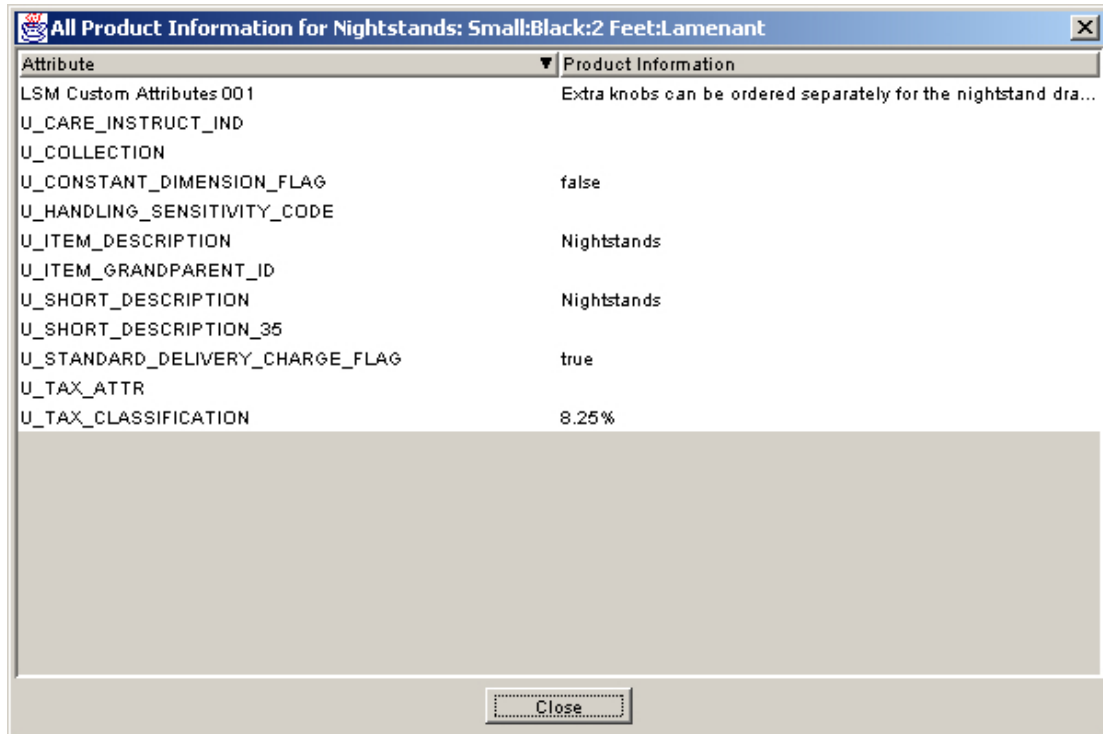
All Close



Note: From the Order Line secondary tab, you can click **Product Information** as an alternative method for accessing product information. The Order Line secondary tab can be found under the Order Entry, Order Main, and Mail Order primary tabs.

Static product information appears on the upper part of the window. Dynamic product information can be accessed from the drop-down lists on the lower part of the window.

1. If the information you need does not appear in the upper part of the window, select the desired attribute from either drop-down list. Product information pertaining to the selected attribute is displayed below the drop-down list.
2. To view all the available attributes in one list, click **All**. The attributes and their values are displayed on the All Product Information window.

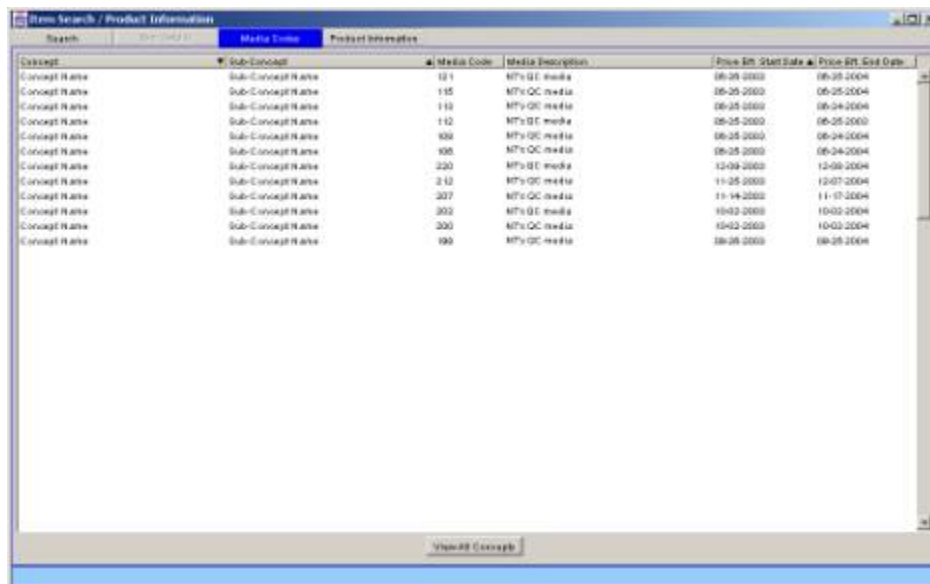


3. Click **Close** to close the All Product Information window.

Look up media

⇒ **Navigate:** On the application toolbar, click Item Search. The Item Search/Product Information window is displayed. Select the Media Codes tab. The media associated with the current concept are displayed.

To view the media associated with all concepts, click **View All Concepts**.



Enter and resolve activity requests

Overview

Miscellaneous requests from customers or associates can be handled as activity requests. The request may be associated with a specific order, but that is not always the case. A request may be entered by one associate and resolved by another.

The following activity requests can be entered on the Activity Request primary tab.

Activity Request	Description
Care Card	A care card is a printed document that explains how to care for or maintain an item.
Forward Address	A customer's address needs to be updated because the current address is temporarily or permanently invalid.
General	A general request is a miscellaneous request that is not covered by any other type of activity request. An example is a request from the customer to cash out the remaining balance on a gift card.
Gift Certificate/ Refund Check	A customer wants to know the remaining value of a gift certificate or the status of a refund.
Item Instructions	An item instructions document is a printed document that provides assembly instructions for an item that must be assembled by the customer.
Label	A call tag or label is a printed document that instructs a carrier to pick up a return from a customer and deliver the return to the warehouse.
Partial	If a part is missing or broken, the customer may order just the part instead of the item. If the item has a selling SKU, the request is entered under Order Main. If the item does not have a selling SKU, it is requested under Activity Request.
Return	A customer wants to know the status of a return. It may be the customer did not send any information with the return that associates it with the customer's original order.
Special Order	A customer requests an item not normally available. If the item can be found, it will be ordered for the customer.
WISMO	Where IS My Order. Either the customer did not receive an order and requests an update on its status or the customer wants to cancel a previous request.

Procedures

Enter an activity request

Navigate: Look up a customer or a customer order. Select the Activity Request primary tab. The customer information is displayed on the Activity Request secondary tab.



Note: Much of the information is automatically filled in for you depending on which tab you were on prior to accessing the Activity Request tab.

1. On the Activity Request secondary tab, select the type of activity request that you want to enter.

2. If the default address is not correct, click **Address Book**. Select the correct address from the Address Book window.
3. In the Customer Contact block, select the preferred contact time and methods of contact.
4. The required information may be defaulted from the Customer Main, Order Entry, or Order Main tabs. Enter any additional information needed to process the request. In most cases, it is necessary to enter comments.
5. Click **Submit Request**. The activity request is added to the list on the Activity Request primary tab.

Look up activity requests

There are several ways to look up an activity request. You can use search criteria to look up a specific activity request or all activity requests grouped by task subtype. Activity requests for a specific customer can be looked up and reviewed. A third method is to look up activity requests by concept and task subtype on the main work list.

Look up one or more activity requests

⇒ **Navigate:** On the Work List primary tab, select the Activity Request Work List secondary tab.

Job #	Create Date	Created By	Connect	Order Options	Task Sub Type	Order Number	Last Update Date	Last Updated By
48090	12-16-2000 2:15 PM CST	malden	malden	malden	malden	100011	02-05-2004 0:02 PM CST	malden
48095	12-16-2000 2:26 PM CST	malden	malden	malden	malden	100011	01-07-2004 2:33 PM CST	malden

1. Enter or select criteria in the search criteria fields on the Activity Request Work List secondary tab. The results are displayed below the search criteria.
2. Double-click an activity request. The system navigates to the Activity Request primary/secondary tab where the details of the activity request are displayed.

Look up activity requests for a specific customer

⇒ **Navigate:** On the Customer Main primary tab, look up and select a customer.

1. Select the Customer History secondary tab. The events pertaining to the customer are displayed.
2. Double-click an Activity Request Created event. The system navigates to the Activity Request primary/secondary tab where the details of the activity request are displayed.

Look up activity requests using the main work list

⇒ **Navigate:** On the Work List primary tab, click **Main Work List**. The Main Work List window is displayed.



1. In the Task Type field, select Activity Request. The outstanding activity requests are displayed on a grid by task subtype and concept.
2. Select the cell where the desired concept and task subtype intersect. The number of outstanding activity requests and the date of the oldest activity request are provided for the concept/task subtype combination.
3. Click **Next**. The system navigates to the Activity Request primary/secondary tab where the details of the oldest activity request are displayed. The Main Work List window is automatically minimized.
4. To view the next activity request for the selected concept/task subtype:
 - a. Maximize the Main Work List window.
 - b. Click **Next**. The next activity request is displayed on the Activity Request primary/secondary tab.
5. When done, click **Close** on the Main Work List window.

Resolve activity requests

- ⇒ **Navigate:** Look up and retrieve an activity request. The details of the activity request are displayed on the Activity Request primary/secondary tab.
1. Review the request and take whatever action is necessary to complete the assigned task.
 2. Determine how you want to process the activity request:
 - To save any changes made to the activity request without changing the status to Closed, click **Submit Request**. The status of the activity request changes from New to In Process.
 - To close the activity request, click **Resolve**. The status of the activity request changes from New or In Process to Closed.

Route activity requests to a print file

- ⇒ **Navigate:** On the Work List primary tab, click **Print File**. The Print File Admin window is displayed.



1. In the Task Filter window, indicate whether you want to view tasks that have not yet been exported (New), tasks that have been batched for export (Existing), or both (All).



Note: Tasks that have exceeded a predefined expiration date are not displayed.

2. Select one or more tasks.
3. To look up a file destination:
 - a. Click **Browse**. The Select Directory window is displayed.
 - b. In the Look In fields, navigate to the desired drive and folder.
 - c. Click **Select Directory**. You are returned to the Print File Admin window. Note that the Create Date and Batch Number fields are automatically filled in.
4. Click **Export File**. The selected tasks are exported to a print file. If the assigned task is auto-resolvable, the Resolved Date field is automatically filled in.
5. When done, click **Cancel**. The Print File Admin window is closed.

Review and resolve pended orders

Overview

Orders may be pended manually or systematically. When pended manually, the associate is prompted to enter a reason for pending the order. When pended systematically, the system provides a reason. Since pended orders cannot be fulfilled, you must investigate and resolve the issues that caused an order to be pended. This is done from the Work List primary tab.

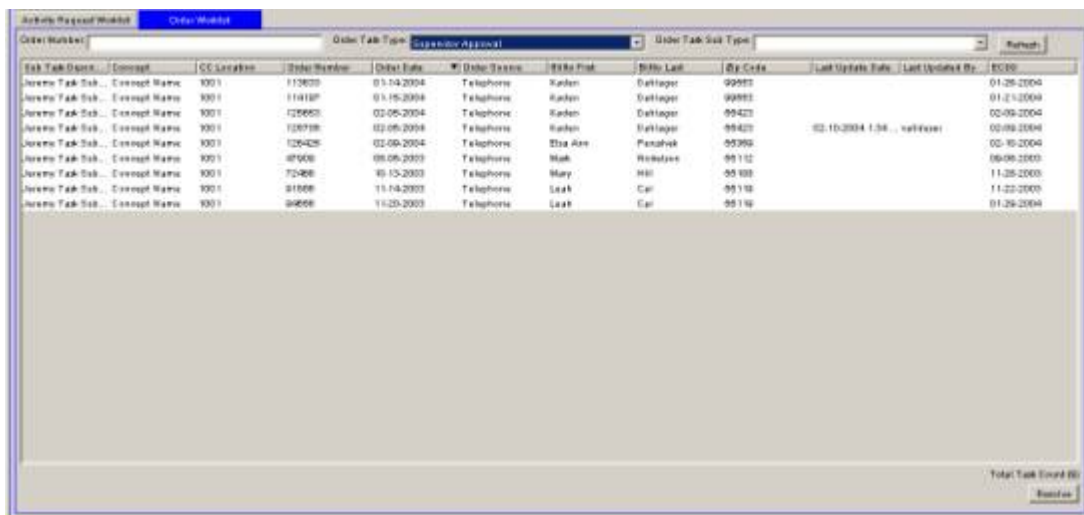
Procedures

Look up pended orders

There are a couple of ways to look up a pended order. You can enter search criteria to look up a specific pended order or pended orders grouped by task type and task subtype. Another method is to look up pended orders by task type, concept, and task subtype on the main work list.

Look up one or more pended orders

⇒ **Navigate:** On the Work List primary tab, select the Order Work List secondary tab.



Task Type	Concept	CC Number	Order Number	Order Date	Order Status	Order Type	Order Code	Order Code	Last Update Date	Last Updated By	Order Code
Jerome Task Tab...	Concept Name	9001	113033	01-14-2004	Telephone	Kaden	99983	99983	01-26-2004		
Jerome Task Tab...	Concept Name	9001	118187	01-15-2004	Telephone	Kaden	99983	99983	01-21-2004		
Jerome Task Tab...	Concept Name	9001	125553	02-05-2004	Telephone	Kaden	99423	99423	02-09-2004		
Jerome Task Tab...	Concept Name	9001	126718	02-05-2004	Telephone	Kaden	99423	99423	02-09-2004		
Jerome Task Tab...	Concept Name	9001	126425	02-05-2004	Telephone	Ella Ann	99390	99390	02-10-2004 1:34	valhalla	
Jerome Task Tab...	Concept Name	9001	487600	08-05-2003	Telephone	Mark	99112	99112	08-09-2003		
Jerome Task Tab...	Concept Name	9001	72480	01-15-2003	Telephone	Mary	99100	99100	11-25-2003		
Jerome Task Tab...	Concept Name	9001	91559	11-14-2003	Telephone	Leah	99118	99118	11-22-2003		
Jerome Task Tab...	Concept Name	9001	94559	11-23-2003	Telephone	Leah	99118	99118	01-29-2004		

1. Enter or select criteria in the search criteria fields on the Order Work List secondary tab. The results are displayed below the search criteria.
2. Double-click a pended order. The system navigates to the Order Main primary tab where the details of the order are displayed.

Look up pending orders using the main work list

⇒ **Navigate:** On the Work List primary tab, click **Main Work List**. The Main Work List window is displayed.

Main Worklist

Task Type: General Pend

	Text Banner - 5	Text Banner - 6	Text Banner - 7	Text Banner - 8	Text Banner - 9	Williams Sonoma
Andy's Task						
Change task						10 (01-07-2004)
efp task						
efp task - a.r.						
efp task - s.a.						
erinn test						
general fraud						
Jeremy Task Description						
Julie supervisor task						
Julie task desc						
manal hend - nan						

Next Close

1. In the Task Type field, select Additional Review, General Pend, or Supervisor Approval. The outstanding pend orders are displayed on a grid by task subtype and concept.
2. Select the cell where the desired concept and task subtype intersect. The number of outstanding pending orders and the date of the oldest order are provided for the concept/task subtype combination.
3. Click **Next**. The system navigates to the Order Main primary tab where the details of the oldest order are displayed. The Main Work List window is automatically minimized.
4. To view the next order for the selected concept/task subtype:
 - a. Maximize the Main Work List window.
 - b. Click **Next**. The details of the next order are displayed on the Order Main primary tab.
5. When done, click **Close** on the Main Work List window.

Resolve pended orders

⇒ **Navigate:** Look up and retrieve a pended order. The details of the order are displayed on the Order Main primary tab.

1. Review the order and take whatever action is necessary to complete the assigned task.
2. On the Order Main primary tab, select the Work List secondary tab.

The screenshot shows the 'Worklist' tab in the Retek Customer Order Management application. The interface is divided into two main sections: 'Pend Rules' on the left and 'Correspondence' on the right. The 'Pend Rules' section contains a table with two columns: 'Failed Pend Rules' and 'Rule Type'. The table lists 'Failed Payment Authorization' and 'Systematic'. Below the table are 'Resolve' and 'Submit Order' buttons. The 'Correspondence' section contains three dropdown menus: 'Correspondence Type:', 'Correspondence Templates:', and 'Delivery Method:'. A 'Submit' button is located at the bottom right of this section. The top of the application window shows a series of tabs: Customer, Order Line, Special Handling, Order Messages, Payment, Payment History, Shipment History, Summary, Order History, and Worklist (which is currently selected).

3. To resolve failed pend rules:
 - a. In the Pend Rules block, select one or more of the failed pend rules.
 - b. Click **Resolve**. The resolved pend rules are removed from the list.
4. [Optional] To request that correspondence be sent to the customer:
 - a. In the Correspondence block, select the type of correspondence.
 - b. In the Correspondence Templates field, select the template to be applied to the correspondence.
 - c. In the Delivery Method field, indicate whether the correspondence should be sent as an e-mail or hard copy.
 - d. To send the request for correspondence, click **Submit** in the Correspondence block.
5. Click **Submit Order** in the Pend Rules block. When all failed pend rules are resolved and the order is submitted, the order can be then be fulfilled.

Enter and resolve personal reminders

Overview

You can enter personal reminders that remain visible only to you. Personal reminders can be linked to an order or an activity request. To create this optional link, you first access the order or activity request, then open the Personal Reminders window. You establish the link by selecting the Associate Order/AR check box when adding or editing a reminder. Once the link is established, you can double-click a reminder in order to navigate to the order or the activity request.

Procedures

Add a personal reminder

⇒ **Navigate:** On the application toolbar, click **Personal Reminders**. Any reminders that have not yet been closed are displayed in the Personal Reminders window.

The screenshot shows the 'Personal Reminders' window. The toolbar at the top includes buttons for 'Create Date', 'Last Updated Date', 'Order/AR Number', 'Due Date' (with a dropdown arrow), 'Resolved Date' (with a dropdown arrow), and 'Reminder Desc'. The main area is a large empty space. At the bottom, there is a form with fields: 'Reminder Description' (text box), 'Due Date' (text box with a 'Cal' button), 'Associate Order/AR' (checkbox), and 'Comments' (text area). To the right of the form is a vertical stack of buttons: 'Add', 'Edit', 'Clear', 'Save', 'Resolve', and 'Close'. There is also an 'Include Closed Lists' checkbox.

1. To view closed reminders in addition to the other reminders, select the Include Closed Lists check box.
2. Click **Add**. The data entry fields are enabled.
3. In the Reminder Description field, enter a title for the reminder.
4. In the Due Date field, enter the date on which the reminder is due or click **Cal** and select the date.

5. Select or clear the Associate Order/AR check box to indicate whether the personal reminder should be associated with the customer order or activity request that you are reviewing.
6. Enter any additional information in the Comments field.
7. Click **Save**. The personal reminder is added to the list.
8. Add, edit, or resolve any additional reminders.
9. When done, click **Close**. The Personal Reminders window is closed.

Edit a personal reminder

⇒ **Navigate:** On the application toolbar, click **Personal Reminders**. Any reminders that have not yet been closed are displayed in the Personal Reminders window.

1. Select a personal reminder.
2. Click **Edit**. The details are displayed in the data entry fields.
3. Update the details as necessary.
4. Click **Save**. The personal reminder is updated.



Note: To clear the data entry fields, click **Clear**.

5. Add, edit, or resolve any additional reminders.
6. When done, click **Close**. The Personal Reminders window is closed.

Resolve a personal reminder

⇒ **Navigate:** On the application toolbar, click **Personal Reminders**. Any reminders that have not yet been closed are displayed in the Personal Reminders window.

1. Select a personal reminder.
2. Click **Resolve**. The status of the reminder changes to closed. It disappears from the list unless the Include Closed Lists check box is selected.
3. Add, edit, or resolve any additional reminders.
4. When done, click **Close**. The Personal Reminders window is closed.

Chapter 7 – Mail order entry

Mail orders are handled somewhat differently than orders received by telephone. You open all the incoming orders and place them in batches of whatever number is most efficient for your organization. Generally a batch contains 50 orders. The orders are stacked by concept and tender type. For each batch of orders, you create a batch header in RCOM. A batch number is generated for each batch. The batch number is used to identify each batch of orders.

The next step is to enter the orders. First you enter the batch number associated with the orders. Then you enter the orders. No validation of the orders occurs during order entry. After all the orders in the batch are entered, you review the batch summary. If there are no variances regarding the number of orders in the batch and the physical tender amount, you can release the batch.

When a batch is released, the system verifies that the necessary information was entered for each order. All monetary calculations, such as taxes, shipping and handling charges, and discounts, are performed. The estimated customer delivery dates are determined.

The status of orders that pass the validation tests changes to Open. The status of orders that fail any of the validation tests becomes Pending. You can look up pended orders on the Work List tab and edit the orders on the Order Main tab.

The following tasks are performed for mail order entry:

- Set up mail order batches
- Enter mail orders
- Reconcile and release batches

Set up mail order batches

Overview

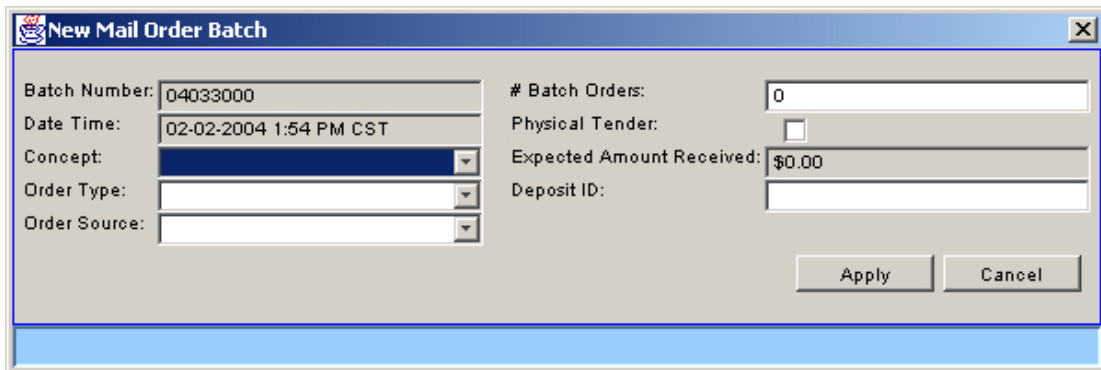
The batch header provides basic information about the orders in the batch. This information is used to recognize any variances between the number of orders expected and the number of orders entered. If physical tender, such as cash, checks, and money orders, is included with the orders, the system verifies that the amount entered equals the amount expected.

Procedures

Create a batch header

⇒ **Navigate:** On the Mail Order primary tab, select the Batch Setup/Update secondary tab. The batches are displayed on the Mail Order primary tab.

1. Click **Create Batch**. The New Mail Order Batch window is displayed.



2. In the Concept field, select the concept to be associated with the batch.
3. In the Order Type field, indicate whether the batch will contain employee orders (Employee) or non-employee orders (Standard).
4. In the Order Source field, indicate whether the orders were received in the mail (Mail Order) or from some other source.
5. In the # Batch Orders field, enter the number of orders that will be entered for this batch.
6. If physical tender was received with the orders (such as cash, checks, and money orders), select the Physical Tender check box.
7. If the Physical Tender check box is selected, enter the total monetary value of the tender in the Expected Amount Received field.
8. In the Deposit ID field, enter the ID of the bank deposit record.
9. Click **Apply**. The window is closed and the batch is added to the list.

Edit a batch header

⇒ **Navigate:** On the Mail Order primary tab, select the Batch Setup/Update secondary tab. The batches are displayed on the Mail Order primary tab.

To filter the batches, select a status in the Status field.

1. Select a batch or enter a batch number in the Current Batch field.
2. Click **Edit Batch**. The Edit Mail Order Batch window is displayed.

The screenshot shows a software window titled "Edit Mail Order Batch". It contains two columns of input fields. The left column includes "Batch Number" (04029000), "Date Time" (01-29-2004 5:38 PM CST), "Concept" (a dropdown menu showing "Concept Name"), "Order Type" (a dropdown menu showing "Standard"), and "Order Source" (a dropdown menu showing "Gift Registry"). The right column includes "# Batch Orders" (50), "Physical Tender" (an unchecked checkbox), "Expected Amount Received" (\$0.00), and "Deposit ID" (an empty field). At the bottom right, there are "Apply" and "Cancel" buttons.

3. Edit the enabled fields as necessary.
4. Click **Apply**. The batch header is updated.

Enter mail orders

Overview

You can use the same method to enter mail orders as you do when entering telephone orders. The difference is that telephone orders are validated as you enter the data. Since you are communicating with the customer, you can verify the data as it is entered. Mail orders are validated after you enter an entire batch of orders. If any errors or missing data are detected, it may be necessary for an associate to contact customers in order to resolve the issues.

Procedures

Identify the customer

⇒ **Navigate:** On the Mail Order primary tab, select the Customer secondary tab.

1. In the Current Batch field on the Mail Order primary tab, enter the batch number that the order is associated with.
2. In the Order Type field, indicate whether the order is an employee order (Employee) or a non-employee order (Standard).
3. Use one of the following methods to look up and select a customer:
 - In the Customer Number field on the Customer secondary tab, enter the identifying number (customer or household number) for the customer. If the number identifies more than one customer, select the customer from the Matched Customer window.
 - Click **Customer Search** on the application toolbar. In the Customer Search window, enter criteria and search for the customer. Select a customer from the results.
 - If no customer matches the criteria entered in the Customer Search window, click **New Customer** in the window. Enter the customer name and bill-to address in the Create New Customer window.
4. If the default source code is not correct, enter the correct one in the Source Code field.
5. If the order is from a store, enter the ID of the store in the Store field.
6. If the default bill-to address is not correct, click **Address Book**. Select the correct address from the Address Book window.

Enter the order lines

⇒ **Navigate:** On the Mail Order primary tab, select the Order Line secondary tab.

1. Enter the selling item number in the Selling Item field.
2. In the Description fields, select the appropriate characteristics of the item.
3. In the Quantity field, enter the number of units requested by the customer.
4. If the item is eligible for personalization or monogramming services, you may be prompted to enter the necessary information. Enter the customer's instructions or click **Cancel** to bypass the prompts.



Note: These windows are not automatically displayed if the items are direct ship items. In that case, you apply the value-added services after saving the item. Select the item on the Mail Order primary tab. Click the personalization or monogramming button to display the appropriate window. The buttons are enabled only for items that were set up with these attributes.

5. If the item is eligible for gift services and the customer requests them, click the gift icon. Enter the details in the Gift window.
6. If any special instructions need to be entered for the item, click **Warehouse Message**. Enter the instructions in the Order Line Instruction Message window.
7. If the customer orders an item for delivery to someone else and the item is backordered, the Backorder Notice to Ship-To check box is enabled. Select the check box if the customer wants a backorder notice sent to the recipient.
8. Enter any changes to the shipping instructions in the Shipping Info block.
9. Click **Apply to Order**. The item is added to the order. The order line is displayed on the Mail Order primary tab.



Note: If for some reason you don't want to add the item to the order, click **Clear for New Entry** instead of **Apply to Order**. The Order Line fields are cleared without saving the order line.

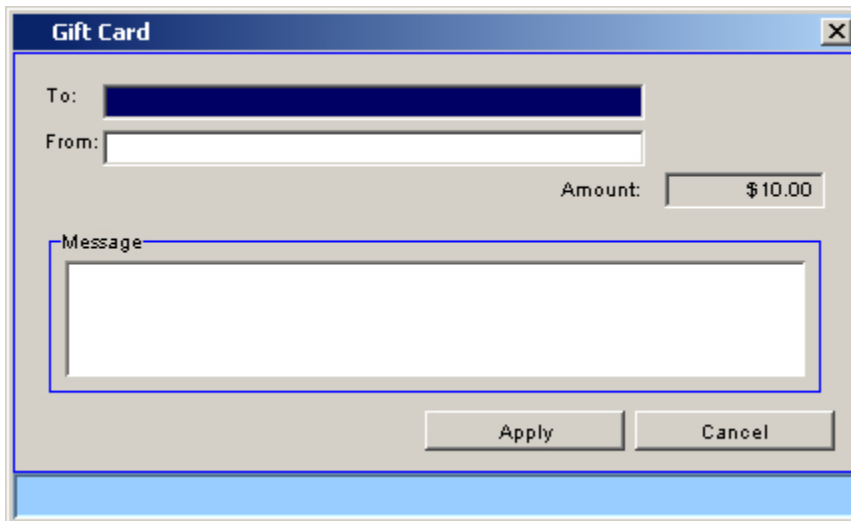
10. Enter any additional order lines.

Add a gift card/gift certificate

Gift cards and gift certificates require additional information when added to an order. Depending on how the item is set up, you may be prompted for the information or you may need to open a window in order to add the information.

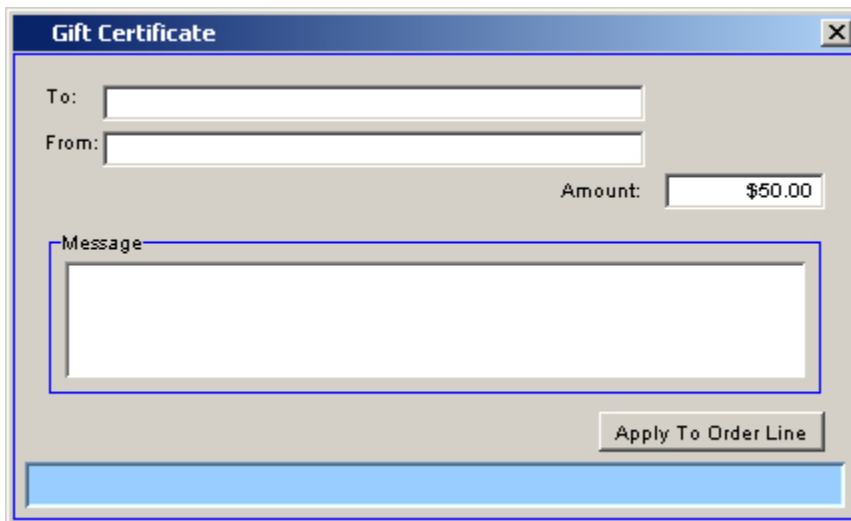
⇒ **Navigate:** On the Mail Order primary tab, select the Order Line secondary tab.

1. For a gift card, the Gift Card window pops up automatically after you enter the selling item number and select the characteristics of the item, such as design and monetary value.



The screenshot shows a window titled "Gift Card" with a close button (X) in the top right corner. Inside the window, there are three input fields: "To:" with a dark blue text box, "From:" with a white text box, and "Amount:" with a white text box containing "\$10.00". Below these fields is a large white text area labeled "Message". At the bottom of the window are two buttons: "Apply" and "Cancel".

For a gift certificate, you must first add it to the order. Then select the order line on the Mail Order primary tab. Click **Gift Certificate** on the Order Line secondary tab. The Gift Certificate window is displayed.



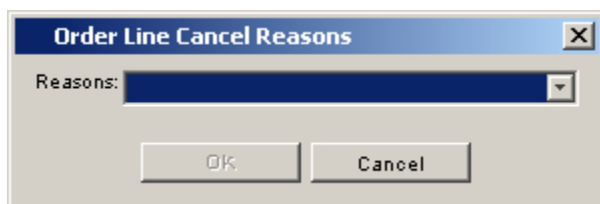
The screenshot shows a window titled "Gift Certificate" with a close button (X) in the top right corner. Inside the window, there are three input fields: "To:" with a white text box, "From:" with a white text box, and "Amount:" with a white text box containing "\$50.00". Below these fields is a large white text area labeled "Message". At the bottom of the window is a single button labeled "Apply To Order Line".

2. In the To field, enter the name of the recipient as designated by the customer.
3. In the From field, enter the name of the sender.
4. In the Amount field, if it is enabled, enter the monetary value of the gift card/gift certificate.
5. In the Message field, enter the text of the customer's message for the recipient.
6. Click **Apply** or **Apply to Order Line**.

Cancel an order line

⇒ **Navigate:** On the Mail Order primary tab, select the Order Line secondary tab.

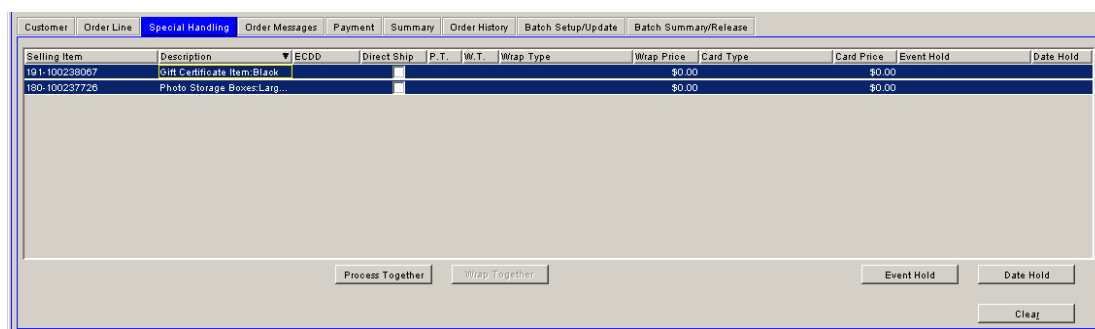
1. On the Mail Order primary tab, select an order line.
2. Click **Cancel Order Line**. The Order Line Cancel Reasons window is displayed.



3. In the Reasons field, select the reason for the cancellation.
4. Click **OK**. The status of the order line changes to Cancelled and the reservation for the requested quantity is released.

Enter special handling requests

⇒ **Navigate:** On the Mail Order primary tab, select the Special Handling secondary tab. The ship-to addresses are displayed on the Mail Order primary tab. Select a ship-to address. The items for the selected ship-to address are displayed on the Special Handling secondary tab.



1. To indicate that two or more items should be processed together or wrapped together, select the items.
 - To process the items together, click **Process Together**. A character appears in the P.T. column for the selected items.
 - To wrap the items together, click **Wrap Together**. A character appears in the W.T. column for the selected items.



Note: Instructions will be sent to the warehouse regarding the marked items.

2. To place a hold on the one or more items, select the affected items.
 - **Predefined event:** Click **Event Hold**. Select the event in the Event Hold window.
 - **Customer-defined date:** Click **Date Hold**. Select the date in the Personal Hold window.



Note: The estimated customer delivery dates are updated accordingly.

3. To clear special handling instructions:
 - a. Select the affected items.
 - b. Click **Clear**. The special handling instructions are cleared.


Enter messages and comments

You can enter messages that will appear on documents made available to others. A message can be sent to the customer via the packing slip. Pick instructions can be sent to warehouse personnel by adding a warehouse message. Information can be sent to carriers by entering a message intended for the shipping label.

Enter messages

- ⇒ **Navigate:** On the Mail Order primary tab, select the Order Messages secondary tab. The ship-to addresses are displayed on the Mail Order primary tab. Select the ship-to address that you want to process.

The screenshot shows a software window titled 'Order Messages'. It has a tabbed interface with tabs for 'Customer', 'Order Line', 'Special Handling', 'Order Messages' (which is active), 'Payment', 'Summary', 'Order History', 'Batch Setup/Update', and 'Batch Summary/Release'. The main area is divided into four sections: 'Packing Slip Message:' (a large text area), 'Warehouse Message:' (a text area), 'Shipping Label Message:' (a text area), and 'Show Prices on Packing Slip?' with 'Yes' and 'No' radio buttons. An 'Apply' button is at the bottom right.

1. To have a message printed on the packing slip, enter the message in the Packing Slip Message field. You can use shortcut keys to enter common expressions.
 2. To request that warehouse personnel provide special handling, enter the instructions in the Warehouse Message field. You can use shortcut keys to enter common expressions.
-  **Note:** The message applies to the selected shipment. To enter a warehouse message for a specific order line, enter the message on the Order Line secondary tab.
3. To indicate whether prices should be printed on the packing slip, select either the Yes or No option.
 4. To have a message printed on the shipping label, enter the message in the Shipping Label Message field. You can use shortcut keys to enter common expressions.
 5. Click **Apply**. The instructions are saved and the Messages and Show Price fields are updated on the Mail Order primary tab.

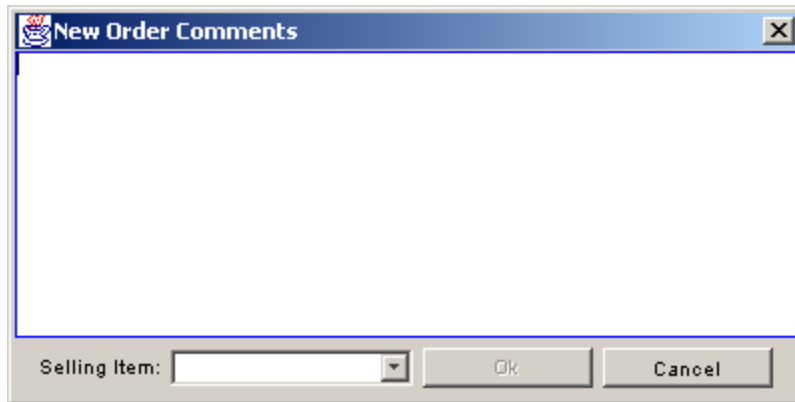
Enter comments

⇒ **Navigate:** On the Mail Order primary tab, select the Order History secondary tab.



Note: The secondary tabs move to the bottom of the primary tab page.

1. Click **Comments**. The New Order Comments window is displayed.



2. Enter the text of your comment in the text box.
3. [Optional] In the Selling Item field, select the item with which you want to associate the comment.
4. Click **OK**. The comment is saved as an Associate Comments event. It is displayed on the Mail Order primary tab.

Enter payments

Customers can use one or multiple tender types to pay for an order. As you enter each payment, you indicate the monetary amount of the payments. When the order balance reaches zero, you have completed the payment process.

If the batch was identified as having physical tender, the physical payment options, such as Cash and Personal Check, are available. Otherwise, the nonphysical tender options, such as Credit Card, are available.

Credit card payments are authorized by an external system. Vouchers and personal checks must be manually authorized. After entering payments that require manual authorization, you must enter an authorization number.

⇒ **Navigate:** On the Mail Order primary tab, select the Payment secondary tab.

1. In the Create Payment block, click the button corresponding to the tender type. The appropriate Payment window is displayed.
2. In the Payment window, enter the details of the payment.
3. Click **Authorize**. The payment is saved. The fields are cleared for entry of another payment.
4. Enter any additional payments.
5. When done entering payments on a payment window, click **Close**.
6. To manually authorize a payment:
 - a. Select a payment that has a status of Manual Authorization.
 - b. In the Enter Authorization # field, enter the authorization number.
 - c. Click **Authorize**. The status of the payment changes to Manually Approved.
7. To cancel a payment:
 - a. Select a payment.
 - b. Click **Cancel Payment**. The status of the payment changes to Cancelled. The order balance is adjusted.

Review and process the order

After providing all the information required for a customer order, the order is ready for review and submission. An invoice is created for each ship-to address/ship method on the order. The invoice includes the ship-to name and address, the order lines, subtotals, and the grand total for the designated ship-to address/ship method. Order-level totals and payments are displayed after the last invoice.

Process the order

⇒ **Navigate:** On the Mail Order primary tab, select the Summary secondary tab. The invoices and summaries are displayed on the Mail Order primary tab.

The screenshot displays the 'Mail Order' summary screen. At the top, there are tabs for Message Center, Customer Main, Order Entry, Order Main, Activity Request, Work List, Mail Order (selected), Reports, Admin, and Security. Below the tabs, the Order Number is 124929, Order Type is Standard, and Order Status is New Order. There are buttons for Credit Card Application, Display Promotions, and Cancel Order. The main area shows a table with 2 order lines. Below the table, there are two 'Ship-To Totals' sections and one 'Order Totals' section. The 'Ship-To Totals' sections show Merchandise Total, Service Total, Shipping Total, Tax Total, Accommodations, Promotional Savings, and Ship-To Total. The 'Order Totals' section shows Merchandise Total, Service Total, Shipping Charge, Tax Total, Accommodations, Promotional Savings, and Order Total. At the bottom, there are buttons for Customer, Order Line, Special Handling, Order Messages, Payment, Summary (selected), Order History, Batch Setup/Update, and Batch Summary/Release. There are also buttons for Pend Order and Submit Order.

#	Type	Item Desc.	Created	Qty	Price	Ext Price	Service	Addl. S&H	Line Tax	Status	ECDD	Carrier	Carrier Service
1	Normal Sale	Gift Certificate Item:Black		1	\$3.00	\$3.00	\$0.00	\$0.00	\$0.00	Mail Order		UPS	Ground RCOM
3	Normal Sale	Photo Storage Boxes:Large:Deep Red		3	\$35.00	\$105.00	\$0.00	\$0.00	\$0.00	Mail Order		UPS	Ground RCOM

Ship-To Totals

Merchandise Total	\$0.00
Service Total	\$0.00
Shipping Total	\$0.00 (Standard - \$0.00, Addl. - \$0.00, Rush - \$0.00)
Tax Total	\$0.00 (Merch - \$0.00, Service - \$0.00, S&H - \$0.00)
Accommodations	(\$0.00) (Amount - (\$0.00), Tax - (\$0.00))
Promotional Savings	(\$0.00)
Ship-To Total	\$0.00

Ship-To Daughter (2 of 2)
Petra Greentree, 901 Tower Road, FOND DU LAC, WI 54935

Order Totals

Merchandise Total	\$0.00
Service Total	\$0.00
Shipping Charge	\$0.00
Tax Total	\$0.00
Accommodations	(\$0.00)
Promotional Savings	(\$0.00)
Order Total	\$0.00

Payments

#	Type	Number	Amount
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Note: The secondary tabs move to the bottom of the primary tab page.

Determine how you want to process the order:

- To submit the order, click **Submit Order**. The status of the order changes from New Order to Submitted. The order is released to the location where it can be fulfilled.



Note: If certain conditions are not met based on system parameters or fraud rules, the status of a submitted order may be automatically changed to Pended. The order is held until any issues are resolved.

- To manually place the order on hold, click **Pend Order**. You are prompted to provide a reason for the hold. The status of the order changes from New Order to Pending The order is held until any issues are resolved.
- To cancel the order, click **Cancel Order**. You are prompted to provide a reason for the cancellation. The status of the order changes from New Order to Cancelled. The order is no longer valid, although it is saved for future reference.

Reconcile and release batches

Overview

Batches cannot be released until the Number of Orders (#) variance equals zero. If the batch contains physical tender, such as cash, checks, and money orders, the Amount (\$) variance must also equal zero. To reconcile the batch, you may need to edit the batch header and the orders associated with the batch. After reconciling the variances, you can release the batch.

Procedures

Reconcile a batch

- ⇒ **Navigate:** On the Mail Order primary tab, select the Batch Summary/Release secondary tab. The orders associated with the current batch are displayed on the Mail Order primary tab. The batch details are displayed on the Batch Summary/Release secondary tab.



Note: If a batch is not automatically displayed, enter the 1) batch number in the Current Batch field or 2) select a batch from those displayed on the Batch Setup/Update secondary tab and return to the Batch Summary/Release tab.

1. To update an order:
 - a. Select an order on the Mail Order primary tab. The details of the order are displayed on the order entry secondary tabs under the Mail Order primary tab.
 - b. Navigate to the appropriate secondary tab and update the order as necessary.
2. To edit the batch header:
 - a. On the Batch Setup/Update secondary tab, select the batch to be edited.
 - b. Click **Edit Batch**.
 - c. In the Edit Mail Order Batch window, edit the necessary fields.
 - d. Click **Apply**. The batch header is updated.

Release a batch

⇒ **Navigate:** On the Mail Order primary tab, select the Batch Summary/Release secondary tab. The orders associated with the batch are displayed on the Mail Order primary tab. The batch details are displayed on the Batch Summary/Release secondary tab.



Note: If a batch is not automatically displayed, enter the 1) batch number in the Current Batch field or 2) select a batch from those displayed on the Batch Setup/Update secondary tab and return to the Batch Summary/Release tab.

Determine how you want to process the batch:

- To release the batch, click **Release Batch**. The orders associated with the batch are validated by the system. The status of the batch changes from Open to Released. The status of the orders that pass the validation tests changes from New to Open. The open orders are released to the location where they can be fulfilled.



Note: If certain conditions are not met based on system parameters, or fraud rules or missing information, the status of an order may be automatically changed to Pended. Pended orders can be reviewed and resolved from the Work List primary tab.

- To manually pend the batch, click **Pend Batch**. The status of the orders in the batch changes to Mail Order Prebatch. The orders can not be validated or released to the warehouse for fulfillment until you release the batch.

Chapter 8 – Reports

Reports pertaining to gross demand and to mail orders are available. These reports are easily generated online.

Review the flash report

Overview

The flash report provides information in two areas:

- **Market:** Summarizes gross demand at the order level.
- **Inventory:** Summarizes gross demand at the order line level.

Flash values are calculated hourly for a 24-hour period. Values are also rolled up to the day-to-date (DTD), week-to-date (WTD), and life-to-date (LTD) levels. Life to date refers to the life of the active or released media. Each day begins at midnight, each week begins on a predefined day. DTD refers to the current day up to the most recent hour.

The flash report provides the following details:

Column	Value
# Orders	The total number of orders submitted during the specified timeframe.
Total Order \$	The total monetary value of the orders submitted during the specified timeframe. Only the merchandise amounts are included in the calculation.
Average (\$)	The average monetary value of the orders submitted during the specified timeframe. Only the merchandise amounts are included in the calculation.
# Units	The total number of units ordered during the specified timeframe.
Total OL \$	The total monetary value of the order lines submitted during the specified timeframe. Only the merchandise amounts are included in the calculation.
Average OL \$	The average monetary value of the order lines submitted during the specified timeframe. Only the merchandise amounts are included in the calculation.

Procedures

Generate the flash report

⇒ **Navigate:** On the Reports primary tab, expand the Flash Reporting folder. Select the Demand Flash option. The Flash Reporting page is displayed.

The screenshot shows the 'Flash Reporting' window with two main data tables: 'Market Flash' and 'Inventory Flash'. Both tables have columns for Time, # Orders, Total Order \$, and Average \$.

Market Flash				Inventory Flash			
Time	# Orders	Total Order \$	Average \$	Time	# Orders	Total Order \$	Average \$
LTD	2	817.00	408.50	20:00 PM	0	0.00	0.00
MTD	0	0.00	0.00	21:00 PM	0	0.00	0.00
QTD	0	0.00	0.00	22:00 PM	0	0.00	0.00
12:00 AM	0	0.00	0.00	23:00 PM	0	0.00	0.00
01:00 AM	0	0.00	0.00	00:00 AM	0	0.00	0.00
02:00 AM	0	0.00	0.00	01:00 AM	0	0.00	0.00
03:00 AM	0	0.00	0.00	02:00 AM	0	0.00	0.00
04:00 AM	0	0.00	0.00	03:00 AM	0	0.00	0.00
05:00 AM	0	0.00	0.00	04:00 AM	0	0.00	0.00
06:00 AM	0	0.00	0.00	05:00 AM	0	0.00	0.00
07:00 AM	0	0.00	0.00	06:00 AM	0	0.00	0.00
08:00 AM	0	0.00	0.00	07:00 AM	0	0.00	0.00
09:00 AM	0	0.00	0.00	08:00 AM	0	0.00	0.00
10:00 AM	0	0.00	0.00	09:00 AM	0	0.00	0.00
11:00 AM	0	0.00	0.00	10:00 AM	0	0.00	0.00
NOON	0	0.00	0.00	11:00 AM	0	0.00	0.00
01:00 PM	0	0.00	0.00	12:00 PM	0	0.00	0.00
02:00 PM	0	0.00	0.00	01:00 PM	0	0.00	0.00
03:00 PM	0	0.00	0.00	02:00 PM	0	0.00	0.00
04:00 PM	0	0.00	0.00	03:00 PM	0	0.00	0.00
05:00 PM	0	0.00	0.00	04:00 PM	0	0.00	0.00
06:00 PM	0	0.00	0.00	05:00 PM	0	0.00	0.00
07:00 PM	0	0.00	0.00	06:00 PM	0	0.00	0.00
08:00 PM	0	0.00	0.00	07:00 PM	0	0.00	0.00
09:00 PM	0	0.00	0.00	08:00 PM	0	0.00	0.00
10:00 PM	0	0.00	0.00	09:00 PM	0	0.00	0.00
11:00 PM	0	0.00	0.00	10:00 PM	0	0.00	0.00

1. In the Concept and Media fields, select the elements for which you want to generate a report. The results are displayed in the Market Flash and Inventory Flash blocks.
2. When done viewing the report, click **Clear Report**. The results and the criteria are cleared.

Review mail order reports

Overview

The mail order reports provide you with information regarding orders received by mail. The following reports are available:

- **Mail order detail:** Lists each mail order that matches the designated criteria. Each record includes the batch number, order number, customer name, payment information, and status.
- **Mail order subtotals:** Summarizes the payment amount attributed to each unique account number. If cash was received the account number is left blank. Amounts paid are subtotaled by tender type.
- **Deposit summary:** States the number of checks included in one deposit (identified by deposit ID) and the number of orders associated with those checks.

Procedures

Generate the mail order details report

⇒ **Navigate:** On the Reports primary tab, expand the Mail Order folder. Select the Mail Order Details option. The Mail Order Detail page is displayed.

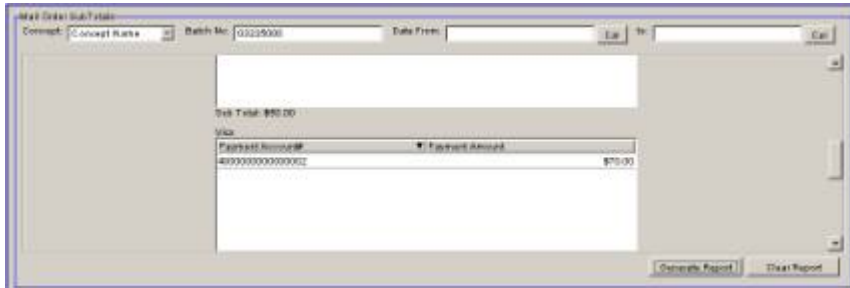
Batch #	Order #	Order Entry ID	Customer Name	Deposit ID	Payment Type	Payment Amount	Deposit Account #	Status
00000000	52107	08-13-2000	Shawn Miskat Per.	GTF BATCH	Visa	\$20.00	4000000000000000000	Open
00000000	52116	08-13-2000	Mary Lynn Forster	GTF BATCH	Visa	\$80.00	4000000000000000000	Open
00000000	52115	08-13-2000	Gina F Perotek	GTF BATCH	Gift Certificate	\$50.00	123	Open

1. Enter criteria in one or more of the report criteria fields.
2. Click **Generate Report**. The results are displayed below the criteria.
3. When done viewing the report, click **Clear Report**. The results and the criteria are cleared.

Generate the mail order subtotals report

⇒ **Navigate:** On the Reports primary tab, expand the Mail Order folder. Select the Mail Order Summary option. The Mail Order Subtotals/Deposit Summary page is displayed.

1. In the Mail Order Subtotals block, enter criteria in one or more of the report criteria fields.



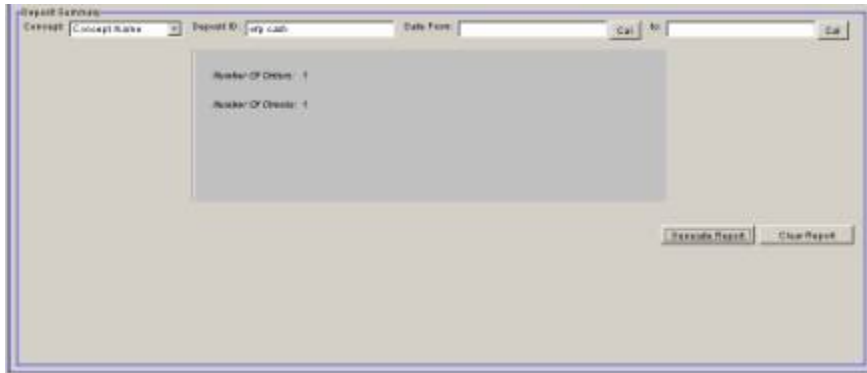
The screenshot shows the 'Mail Order Sub Totals' form. At the top, there are fields for 'Connect' (set to 'Concept Name'), 'Batch No.' (03225000), and 'Date From'. Below these is a large empty text area. To the right of this area, it says 'Tot Total: \$50.00'. Below that is a 'Via' section with a 'Payment Amount' field showing '\$70.00' and a 'Payment Amount' field showing '4000000000000000'. At the bottom right, there are two buttons: 'Generate Report' and 'Clear Report'.

2. Click **Generate Report**. The results are displayed below the criteria. Be sure to scroll through the results as only one tender type at a time is displayed on the page.
3. When done viewing the report, click **Clear Report**. The results and the criteria are cleared.

Generate the deposit summary report

⇒ **Navigate:** On the Reports primary tab, expand the Mail Order folder. Select the Mail Order Summary option. The Mail Order Subtotals/Deposit Summary page is displayed.

1. In the Deposit Summary block, enter criteria in one or more of the report criteria fields.



The screenshot shows the 'Deposit Summary' form. At the top, there are fields for 'Connect' (set to 'Concept Name'), 'Report ID' (set to 'vfp cash'), and 'Date From'. Below these is a large empty text area. At the bottom right, there are two buttons: 'Generate Report' and 'Clear Report'.

2. Click **Generate Report**. The results are displayed below the criteria.
3. When done viewing the report, click **Clear Report**. The results and the criteria are cleared.

Chapter 9 – Administration

A variety of miscellaneous tasks are covered under the Admin tab. These include the following:

- Backorder notifications
- Carrier maintenance
- Correspondence
- Daily Messages
- Event History Types
- Reason Codes
- Match code rules
- Order fulfillment
- Order Management
- Pend maintenance
- Returns
- Scripting
- Catalog Request
- System parameters
- Call centers
- Work lists

Backorder notifications

Overview

Pending backorder notifications

Backorder notifications are systematically sent to customers when one or more items on an order are not readily available from inventory. There is a 24-hour waiting period from the time a BO notification is requested before it is submitted for fulfillment. If the backordered items become available within that 24-hour period, you can cancel the request for a BO notification. The following procedures are available:

- Look up pending BO notifications
- Cancel a pending BO notification

NLA items

When an item becomes no longer available (NLA), it is necessary to cancel all of the order lines where the NLA item is currently in backorder status. Correspondence will be sent to the affected customers in order to notify them that the item is no longer available. The following procedure is available:

- Cancel items that are no longer available

⇒ **Navigate:** On the Admin primary tab, expand the Backorder Notifications folder. Select the Pending BO Notifications option. The Pending BO Notifications page is displayed.

Search Criteria

Department: Class: Technician: Title: Item:

Concept: Concept Name: Channel: Supplier:

Setting Item:

Inventory Item	Description	Unit	Order	Cat/Item	Alt Qty	Orig. Cost	Revised Cost	Supplier	# of Notifications
100227260 Cow	East Large	79400	20404	0 10-01-2003	10-01-2003	0			
100227259 Cow	East Large	79400	20404	0 10-01-2003	10-01-2003	0			
100227258 Cow	East Large	79400	20404	0 10-01-2003	10-01-2003	0			
100227267 Cow	East Medium	79400	20404	2 11-02-2003	01-08-2004	0			
100227267 Cow	East Medium	79400	20404	2 11-02-2003	01-08-2004	0			
100227181 Hightails	Small/Med...	13025	473 40	10 1-28-2004	01-28-2004	0			
100227218 Penwith	Bigging Large	13090	473 40	10 1-28-2004	01-28-2004	0			
100227218 Penwith	Bigging Large	13021	473 40	10 1-27-2004	01-28-2004	0			
100227218 Penwith	Bigging Large	13040	980 12	10 1-27-2004	01-28-2004	0			
100227187 Hightails	Small/Med...	13080	10554	10 1-28-2004	01-28-2004	0			
100227170 Hightails	Small/Med...	13590	10554	10 1-25-2004	01-28-2004	0			
100227187 Hightails	Small/Med...	13080	10554	10 1-28-2004	01-28-2004	0			
100227186 Hightails	Small/Med...	13590	980 12	10 1-25-2004	01-28-2004	0			
100227186 Hightails	Small/Med...	13080	980 12	10 1-28-2004	01-28-2004	0			
100227187 Hightails	Small/Med...	13725	10554	10 1-25-2004	01-28-2004	0			
100227187 Hightails	Small/Med...	13725	10554	10 1-28-2004	01-28-2004	0			
100227181 Hightails	Small/Med...	140 880	10554	10 1-27-2004	01-28-2004	0			
100227187 Hightails	Small/Med...	140 880	10554	10 1-27-2004	01-28-2004	0			
100227181 Hightails	Small/Med...	140 880	10554	10 1-27-2004	01-28-2004	0			
100227187 Hightails	Small/Med...	140 880	10554	10 1-27-2004	01-28-2004	0			

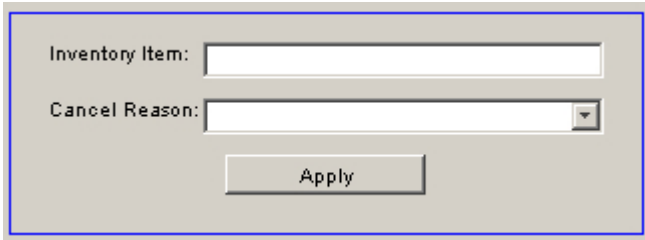
1. Enter search criteria in one or more fields in the Search Criteria block.
2. Click **Search**. The results are displayed below the search criteria.

⇒ **Navigate:** Look up and select one or more pending backorder notifications.

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Cancel items that are no longer available

⇒ **Navigate:** On the Admin primary tab, expand the Backorder Notifications folder. Select the Cancel NLA Items option. The Cancel NLA Items page is displayed.

A screenshot of a web form titled "Cancel NLA Items". The form has a light gray background and a blue border. It contains two input fields: "Inventory Item:" with a text box, and "Cancel Reason:" with a dropdown menu. Below these fields is a button labeled "Apply".

Inventory Item:

Cancel Reason:

1. In the Inventory Item field, enter the item number of the item that is no longer available.
2. In the Cancel Reason field, indicate why the item is no longer available.
3. Click **Apply**. The status of the item changes to cancelled on all orders where the item is currently on backorder.

Carrier maintenance

Overview

Carriers

On the Carrier Maintenance page, you can update account, pickup, and tracking information for the carriers with which you do business. The carriers appearing in the list of carriers are imported into RCOM from an external system. The following procedure is available:

Edit a carrier

Carrier services

Carriers and services are maintained elsewhere and imported into RCOM. Once imported, it is necessary to indicate which carriers provide each service. If more than one carrier provides a service, you must indicate which carrier is the default provider of the service.

Associates can override the default carrier and service when adding order lines to a customer order.

The following procedure is available:

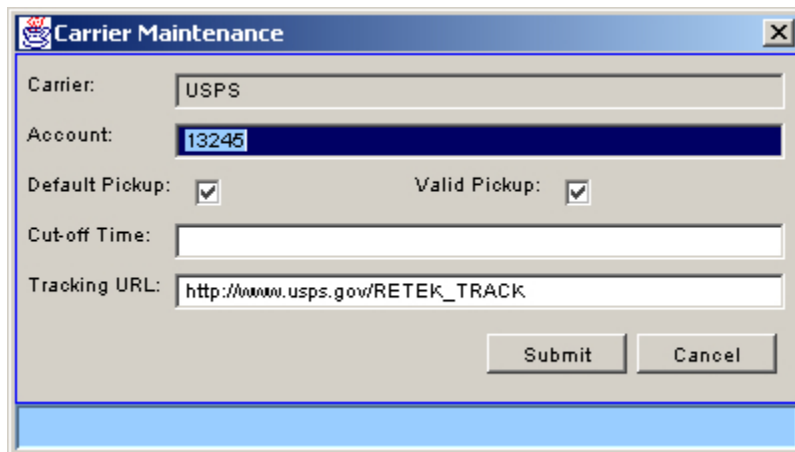
Edit a carrier service

Procedures

Edit a carrier

⇒ **Navigate:** On the Admin primary tab, expand the Carrier Maintenance folder. Select the Carrier Maintenance option. The carriers are displayed on the Carrier Maintenance window.

1. Select a carrier
2. Click **Edit**. The Carrier Maintenance window is displayed.



The image shows a 'Carrier Maintenance' dialog box with the following fields and controls:

- Carrier:** Text field containing 'USPS'.
- Account:** Text field containing '13245'.
- Default Pickup:** Check box, checked.
- Valid Pickup:** Check box, checked.
- Cut-off Time:** Empty text field.
- Tracking URL:** Text field containing 'http://www.usps.gov/RETEK_TRACK'.
- Buttons:** 'Submit' and 'Cancel' buttons at the bottom right.

3. In the Account field, enter the account number that you have established with the carrier.
4. To indicate the carrier is the default carrier for order pickups, select the Default Pickup check box. Only one carrier may be designated as the default carrier.
5. To indicate the carrier will pick up orders, select the Valid Pickup check box.

6. In the Cutoff Time field, indicate at what time the day ends as far as the carrier is concerned. Orders taken after the cutoff time will be dated for the next business day.
7. In the Tracking URL field, enter the address of the carrier's web page on which shipments can be tracked.
8. Click **Submit**. The window is closed and the record is updated.


Edit a carrier service

⇒ **Navigate:** On the Admin primary tab, expand the Carrier Maintenance folder. Select the Carrier Service Maintenance option. The services are displayed on the Carrier/Carrier Service Maintenance page.

1. Select a service.
2. Click **Edit Carrier Service**. The Edit Carrier Service window is displayed.

The screenshot shows the 'Edit Carrier Service' window. At the top, there are three input fields: 'Carrier Service' (Overnight - RCOM), 'Days' (2), and 'Default Carrier' (UPS). Below these are two list boxes. The 'Carriers Available' list contains 'AM Carrier 14', 'EFP Shipping Service', and 'USPS'. The 'Associated Carriers' list contains 'Fed Ex' and 'UPS'. Between the two list boxes are four buttons: '>>', '>', '<<', and '<'. At the bottom of the 'Associated Carriers' list, there are three buttons: 'Set Default Carrier', 'Set Rush Delivery', and 'Clear Rush Delivery'. At the very bottom of the window are 'Ok' and 'Cancel' buttons.

3. In the Days field, enter the number of days required for merchandise to be shipped from the source (warehouse or direct-ship supplier) to the ship-to address. This assumes that the merchandise is available for shipment.

4. Select one or more carriers that will provide the selected service:
 - Click > to move the selected carriers from the Carriers Available list to the Associated Carriers list.
 - Click >> to move all the carriers from the Carriers Available list to the Associated Carriers list.
 - Click < to move the selected carriers from the Associated Carriers list back to the Carriers Available list.
 - Click << to move all the carriers from the Associated Carriers list back to the Carriers available list.
 5. To indicate that rush delivery charges should be added to the cost of the service:
 - a. Select one or more carriers in the Associated Carriers list.
 - b. Click **Set Rush Delivery**. The Rush Delivery Charge check box is automatically selected next to the desired carriers.
-  **Note:** To clear the Rush Delivery Charge check boxes, select the carriers and click **Clear Rush Delivery**.
6. To indicate which carrier is the default carrier:
 - a. Select a carrier in the Associated Carriers list.
 - b. Click **Set Default Carrier**. The carrier is displayed in the Default Carrier field.
 7. Click **OK**. The window is closed and the record is updated.

Correspondence rules

Overview

Correspondence rules make it possible for the system to generate correspondence requests to a third-party system for fulfillment. When a predefined event occurs in RCOM, a message is sent to the third-party system. The message indicates that correspondence must be sent to the designated customer using the designated template and delivery method.

Procedures

Add a correspondence rule

- ⇒ **Navigate:** On the Admin primary tab, expand the Correspondence folder. Select the Set Up option. The rules are displayed on the Correspondence Type/Template Relationship page.
1. Click **Add Relationship**. The Correspondence Type/Template Relationship window is displayed.

Correspondence Type/Template Relationship			
Template Details			
Concept:	<input type="text"/>		
Correspondence Type:	<input type="text"/>		
Template Name:	<input type="text"/>	Default Template: <input type="checkbox"/>	
Delivery Methods			
Delivery Method	Available	Default	
Both	<input type="checkbox"/>	<input type="checkbox"/>	
Email	<input type="checkbox"/>	<input type="checkbox"/>	
Hard Copy	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="button" value="Ok"/> <input type="button" value="Cancel"/>			

2. In the Concept field, select the concept that you want to associate with the correspondence type.
3. In the Correspondence Type field, identify the trigger for the correspondence.
4. In the Template Name field, select the format to be associated with the correspondence.
5. If the template you've selected is the default template for the correspondence type, select the Default Template check box.
6. In the Delivery Methods block:
 - a. Indicate whether the correspondence can be delivered by e-mail, hardcopy, or both methods.
 - b. Select the Default check box next to the preferred delivery method.

7. Click **OK**. The record is added to the list on the Correspondence Type/Template Relationship page.

Edit a correspondence rule

- ⇒ **Navigate:** On the Admin primary tab, expand the Correspondence folder. Select the Set Up option. The rules are displayed on the Correspondence Type/Template Relationship page.
1. Select a rule.
 2. Click **Edit Relationship**. The Correspondence Type/Template Relationship window is displayed.
 3. Edit the enabled fields as necessary.
 4. Click **OK**. The record is updated.

Event history type

Overview

Event History Types allows you to:

- Edit event history type descriptions for both systematic and external events.
- Add/Modify external events
- Inactivate existing external events.

Procedures

Maintain history event types

Add an external history event type

- ⇒ **Navigate:** On the Admin primary tab, expand the Event History Types folder. Select the Maintain Event History Types option. The history event types are displayed on the Maintain History Event Type page.
1. Click **Add/Edit History Event Type**. The History Event Type Maintenance window is displayed.
 2. In the Visibility field, select the visibility you want the history event type to have.
 3. In the Description field, enter the description for the history event type.
 4. Click **Submit** add the history event type.

Edit a systematic history event type

- ⇒ **Navigate:** On the Admin primary tab, expand the Event History Types folder. Select the Maintain Event History Types option. The history event types are displayed on the Maintain History Event Type page.
1. Select an event type from the list.
 2. Click **Add/Edit History Event Type**. The History Event Type Maintenance window is displayed.
 3. Edit the description for the history event type.
 4. Click **Submit** to save changes.

Inactivate an external event

- ⇒ **Navigate:** On the Admin primary tab, expand the Event History Types folder. Select the Maintain Event History Types option. The history event types are displayed on the Maintain History Event Type page.
1. Select an external history event type from the list.
 2. Click **Add/Edit History Event Type**. The History Event Type Maintenance window is displayed.
 3. Deselect **Active** to inactivate the external history event type.
 4. Click **Submit** to save changes.

Return reasons

Overview

Return reasons are maintained elsewhere and imported into RCOM. Within RCOM, you can indicate which monetary values are to be refunded to a customer for each return reason. An associate is prompted to enter a return reason when entering a return request for a customer.

Procedures

Maintain refund options

- ⇒ **Navigate:** On the Admin primary tab, expand the Maintain Reason Codes folder. Select the Maintain Return Reason option. The return reasons are displayed on the Maintain Return Reasons page.

Return Reason Description	Refund S&H	Refund VAS	Refund Gifting
Broken Seal	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Carrier Delivered Late	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Color Not As Shown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer changed mind	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Damaged	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Defective	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Did Not Like Color	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exchange Fulfillment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expiration Date Expired	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gift Wrap is wrong color	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Misjudged Size - Too Large	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Misjudged Size - Too Small	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Monogram Not As Requested	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Poor Quality	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Refused Shipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Returning Gift	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Taste	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wrong Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wrong Item Shipped	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wrong Size Shipped	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Submit

- Select the appropriate check boxes next to each return reason.
 - Refund S&H:** Shipping and handling charges will be refunded to the customer. Charges for rush delivery are not included in the refund.
 - Refund VAS:** Value-added service fees for personalization and monogramming will be refunded to the customer.
 - Refund Gifting:** Gifting fees for gift wrap and cards will be refunded to the customer.
- Click **Submit** to save any changes.

Match code rules

Overview

Match code functionality causes the system to query existing customers for records that might match a new customer. The query is performed as an associate enters customer contact information into RCOM.

The query uses predefined criteria to determine whether a match exists. If matches are found, the results are displayed for the associate. The associate can choose a matching record or continue entering the new record.

To set up match code functionality, you must:

- **Activate match code functionality:** This is done on the System Parameters and Concept Parameters page (Admin > System Administration > System Parameters).
- **Set up match code rules:** This is done on the Match Code Maintenance page (Admin > Match Code Maintenance > Match Code Maintenance).

Procedures

Maintain match code rules

- ⇒ **Navigate:** On the Admin primary tab, expand the Match Code Maintenance folder. Select the Match Code Maintenance option. The rules are displayed on the Match Code Maintenance page.

Search Fields	Rule 1	Rule 2	Rule 3
First Name:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Middle Name:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last Name:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address Line1:	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Address Line2:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address Line3:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
County:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Zip:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Phone:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email:	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Submit

1. In the Rule 1 column, select the check box next to each field that is a criterion for matching customer records on the first pass.



Note: Each rule is treated as an OR condition.

2. [Optional] In the Rule 2 column, select the check box next to each field that is a criterion for matching customer records on the second pass.
3. [Optional] In the Rule 3 column, select the check box next to each field that is a criterion for matching customer records on the third pass.
4. Click **Submit** to save any changes.

Order fulfillment

Overview

Operational costs related to fulfillment can be reduced by using regional warehouses. You can set up rules that control which warehouses are used to support one or more regions of a country. Rules-based fulfillment impacts the customer order from capture to distribution.

A three step process is involved in setting up regional warehouses for fulfillment:

1. Set up zip code ranges
2. Set up warehouse priorities
3. Set up non-business days

By setting up zip code (or postal code) ranges, you break up a country into regions based on their zip code. After defining the zip code ranges, you can then assign one or more warehouses to each zip code range. You assign the warehouses in order of their priority. As a result, order lines will be routed to the priority 1 warehouse if the merchandise and value-added services are available there. If the merchandise and value-added services are not currently available, the order line is route to lower priority warehouses for fulfillment.

In order to accurately calculate estimated customer delivery dates, you must identify the days on which merchandise is not shipped from the warehouses. For example: If shipments are not made on holidays and weekends, you should identify those dates as non-business days.

Procedures

Set up zip code ranges

Add zip code ranges

⇒ **Navigate:** On the Admin primary tab, expand the Order Fulfillment folder. Select the Zip Code Ranges option. The zip code ranges are displayed on the Zip Code Ranges Maintenance page.

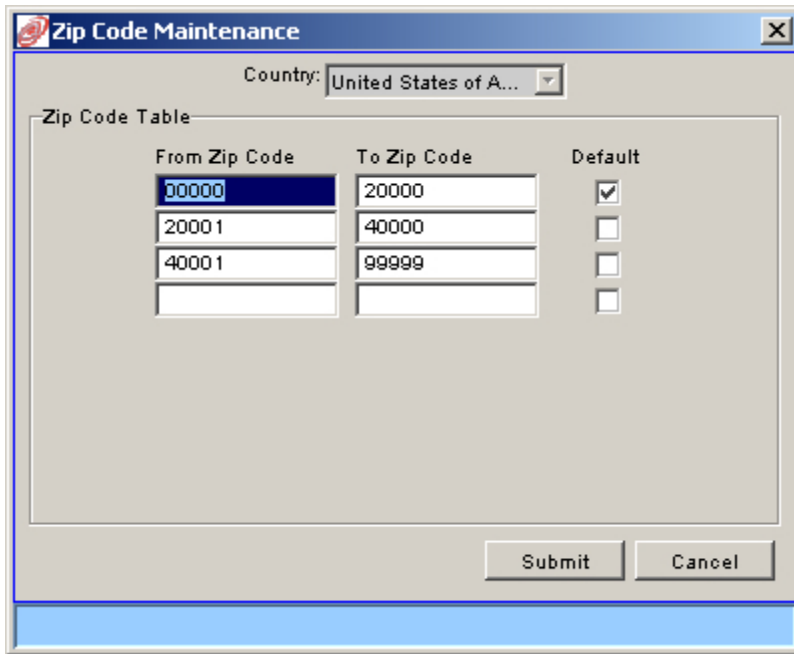
1. Click **Add Zip Code**. The Zip Code Maintenance window is displayed.

From Zip Code	To Zip Code	Default
		<input checked="" type="checkbox"/>

2. In the Country field, select the country for which you want to set up postal code ranges.
3. In the From Zip Code and To Zip Code fields, enter the lowest number and highest number of the range.
4. Continue adding ranges until all have been added.
5. Select the Default check box next to the range that you want to mark as the default.
6. Click **Submit**. The window is closed and the ranges are added to the list.

Edit zip code ranges

- ⇒ **Navigate:** On the Admin primary tab, expand the Order Fulfillment folder. Select the Zip Code Ranges option. The zip code ranges are displayed on the Zip Code Ranges Maintenance page.
1. Select a country (or any range listed under the country record) that you want to edit.
 2. Click **Edit Zip Code**. The ranges associated with the country are displayed in the Zip Code Maintenance window.



The image shows a 'Zip Code Maintenance' window. At the top, there is a 'Country:' dropdown menu set to 'United States of A...'. Below this is a 'Zip Code Table' with three columns: 'From Zip Code', 'To Zip Code', and 'Default'. The table contains four rows of data. The first row has '00000' in the 'From Zip Code' column, '20000' in the 'To Zip Code' column, and a checked 'Default' checkbox. The second row has '20001' in the 'From Zip Code' column, '40000' in the 'To Zip Code' column, and an unchecked 'Default' checkbox. The third row has '40001' in the 'From Zip Code' column, '99999' in the 'To Zip Code' column, and an unchecked 'Default' checkbox. The fourth row has empty fields for 'From Zip Code' and 'To Zip Code', and an unchecked 'Default' checkbox. At the bottom right of the window are 'Submit' and 'Cancel' buttons.

From Zip Code	To Zip Code	Default
00000	20000	<input checked="" type="checkbox"/>
20001	40000	<input type="checkbox"/>
40001	99999	<input type="checkbox"/>
		<input type="checkbox"/>

3. Edit the ranges as necessary.
4. Select the Default check box next to the range that you want to mark as the default.
5. Click **Submit**. The window is closed and the ranges are updated for the selected country.

Set up warehouse priorities

Add warehouse priorities

⇒ **Navigate:** On the Admin primary tab, expand the Order Fulfillment folder. Select the Warehouse Priorities option. The priorities are displayed on the Warehouse Priorities page.

1. Click **Add Priority**. The Warehouse Priority window is displayed.

The screenshot shows the 'Warehouse Priority' window. It includes a 'Country' dropdown, a 'Zip Code Range' dropdown, and a 'Prioritized Ranges' dropdown. Between these dropdowns are four buttons: '>>', '>', '<<', and '<'. A 'Make Default' button is located below the 'Prioritized Ranges' dropdown. The bottom section of the window contains a table with 10 rows, each with a 'Priority' column (numbered 1-10) and a 'Warehouse' column (a dropdown menu). At the bottom of the window are 'Apply', 'Cancel', and 'Close' buttons.

2. In the Country field, select the country for which you want to set up priorities. The predefined zip code ranges for the selected country are displayed in the available block.
3. Select one or more zip code ranges from the available block and move them to the assigned block.
 - To move all ranges from the available block to the assigned block, click >>.
 - To move all ranges from the assigned block to the available block, click <<.
 - To move only the selected ranges from the available block to the assigned block, click >.
 - To move only the selected ranges from the assigned block to the available block, click <.

4. Select the Default check box next to the range that you want to mark as the default.



Note: When you create a zip code range under the Zip Code Ranges option on the Admin primary tab, the range inherits the warehouse priorities assigned to this default range.

5. In the Warehouse block, select the warehouses in order of priority for the ranges in the assigned block.
 - Click **Apply**. The warehouses are associated with the selected ranges.
 - Assign warehouse priorities to any remaining ranges for the current country.
 - When done, click **Close**.

Edit warehouse priorities

⇒ **Navigate:** On the Admin primary tab, expand the Order Fulfillment folder. Select the Warehouse Priorities option. The priorities are displayed on the Warehouse Priorities page.

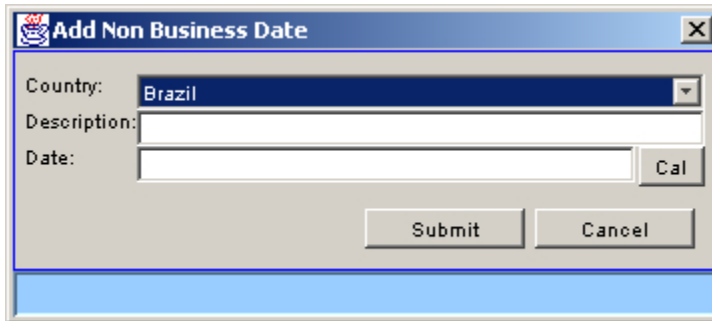
1. Select the one or more records for the same country.
2. Click **Edit Priority**. The Warehouse Priority window is displayed.
3. Move any ranges to the assigned block for which you want to edit warehouse priorities.
4. Select the Default check box next to the range that you want to mark as the default.
5. In the Warehouse block, select the warehouses in order of priority for the selected ranges.
6. Click **Apply**. The warehouses are associated with the selected ranges.
7. Update the warehouse priorities for any remaining ranges.
8. When done, click **Close**.

Set up non-business days

Add a non-business day

⇒ **Navigate:** On the Admin primary tab, expand the Order Fulfillment folder. Select the Non Business Days option. The dates are displayed on the Non Business Days page.

1. Click **Add**. The Add Non Business Date window is displayed.



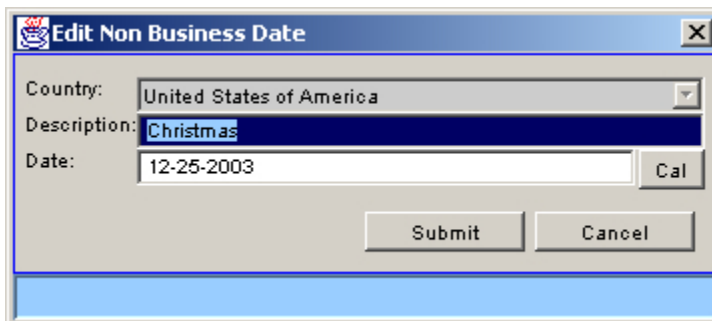
The screenshot shows a dialog box titled "Add Non Business Date". It contains three input fields: "Country:" with a dropdown menu showing "Brazil", "Description:" with an empty text box, and "Date:" with an empty text box and a "Cal" button to its right. At the bottom of the dialog are "Submit" and "Cancel" buttons.

2. In the Country field, select the affected country.
3. In the Description field, indicate why the business will be closed.
4. In the Date field, enter the date on which the business will be closed, or click **Cal** and select the date.
5. Click **Submit**. The date is added to the list.

Edit a non-business day

⇒ **Navigate:** On the Admin primary tab, expand the Order Fulfillment folder. Select the Non Business Days option. The dates are displayed on the Non Business Days page.

1. Select a record.
2. Click **Edit**. The Edit Non Business Date window is displayed.



The screenshot shows a dialog box titled "Edit Non Business Date". It contains three input fields: "Country:" with a dropdown menu showing "United States of America", "Description:" with a text box containing "Christmas", and "Date:" with a text box containing "12-25-2003" and a "Cal" button to its right. At the bottom of the dialog are "Submit" and "Cancel" buttons.

3. Edit the description (or reason for the closure) and date as necessary.
4. Click **Submit**. The record is updated.

Cancel reasons

Overview

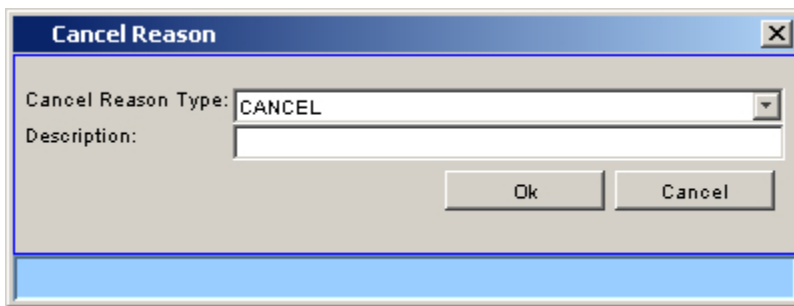
When associates cancel an order line or an order line is processed as an exchange, partial, replacement, or return, they are prompted to enter a reason for the change. While some reasons are defined during system installation, you can set up additional reasons for associates to choose from.

Procedures

Add a cancel reason

⇒ **Navigate:** On the Admin primary tab, expand the Order Management folder. Select the Maintain Cancel Reasons option. The cancel reasons are displayed on the Create/Maintain Cancel Reasons page.

1. Click **Add Cancel Reason**. The Cancel Reason window is displayed.

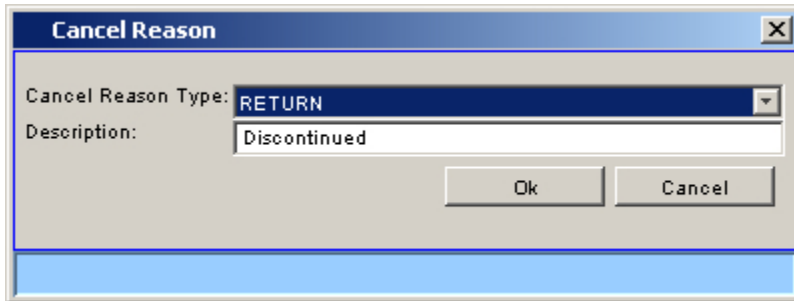


2. In the Cancel Reason Type field, select the type of cancel reason. The type indicates which event caused an order line to be cancelled.
3. In the Description field, enter the reason.
4. Click **OK**. The window is closed and the cancel reason is added to the list.

Edit a cancel reason

⇒ **Navigate:** On the Admin primary tab, expand the Order Management folder. Select the Maintain Cancel Reasons option. The cancel reasons are displayed on the Create/Maintain Cancel Reasons page.

1. Select a cancel reason.
2. Click **Edit Cancel Reason**. The Cancel Reason window is displayed.



The screenshot shows a standard Windows-style dialog box titled "Cancel Reason". It contains two input fields: a dropdown menu for "Cancel Reason Type" which is currently set to "RETURN", and a text box for "Description" which contains the word "Discontinued". At the bottom right of the dialog are two buttons labeled "Ok" and "Cancel".

3. Edit the type and description as necessary.
4. Click **OK**. The window is closed and the record is updated.

Pend maintenance

Overview

Pend parameters are set up in order to systematically validate customer orders during order entry and order maintenance. If customer orders fail the validation process, they are automatically pended for further review. A customer order may fail for one or multiple reasons.

The pended customer orders can be reviewed by an associate on the Work List primary tab. From there, the associate can access the order, resolve the issues, and resubmit the order.

In order to set up pend parameters, the following tasks must be performed:

- Set up negative files
- Set up high-risk zip codes
- Set up pend rules

Procedures

Set up negative files

Negative files consist of customer, customer contact, and order-related information that were determined to be fraudulent. Negative files can be imported from a third-party system or entered systematically and manually in RCOM. One or more negative files must be set up before they can be used effectively as a pend rule criterion.

If an associate cancels a customer order, the associate is prompted to enter a reason for the cancellation. Should the associate select fraud as a reason, a negative file is automatically created for the customer.



Note: Negative files that are marked as inactive are not used for fraud validation.

Add a negative file

⇒ **Navigate:** On the Admin primary tab, expand the Pend Maintenance folder. Select the Negative File option. The negative files are displayed on the Negative File List page.

1. Click **Add Negative File**. The Add Negative File window is displayed.

2. In the Customer # field, enter the customer number that identifies the customer.
3. In the Reason field, select the reason for the negative file.
 - **Customer alert:** The customer or address might be fraudulent. Further investigation is necessary.
 - **Fraud:** The customer or address has been determined to be fraudulent.
5. Select or clear the Inactive check box to indicate whether the negative file should be activated.
6. In the Comment field, enter any supporting information.
7. In the Customer Information fields and Order Information fields, enter as much information as is known.



Note: The following fields are required: Address 1, City, State, and Zip Code.

8. Click **OK**. The window is closed and the record is added to the negative file list.

Edit a negative file

⇒ **Navigate:** On the Admin primary tab, expand the Fraud folder. Select the Negative File option. The negative files are displayed on the Negative File List page.

1. Click **Edit Negative File**. The Edit Negative File window is displayed.

2. Edit the details as necessary.
3. Select or clear the Inactive check box to indicate whether the negative file should be activated.
4. Click **OK**. The window is closed and the record is updated.

Set up high-risk zip codes

The high-risk zip code file contains a list of zip codes for locations that have been determined to have a high proportion of fraudulent orders. Records can be imported from a third party system or entered manually. The high-risk zip code file must be set up before it can be used as a fraud rule criterion.



Note: High risk zip codes that are marked as inactive are not used for fraud validation.

Add a high risk zip code

⇒ **Navigate:** On the Admin primary tab, expand the Pend Maintenance folder. Select the High Risk Zip Codes option. The zip codes are displayed on the High Risk Zip Codes page.

1. Click **Add Zip Code**. The Add High Risk Zip Code window is displayed.

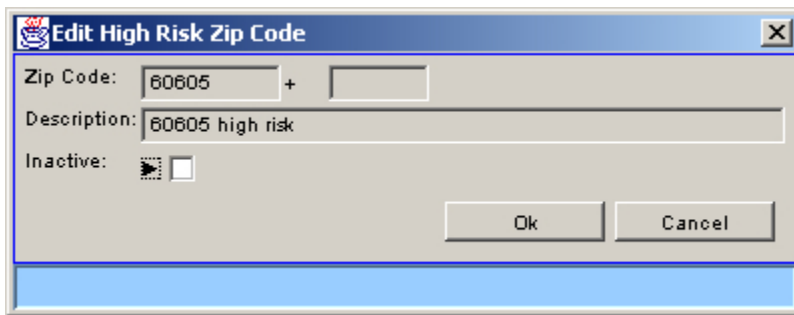
2. In the Zip Code field enter a 5-digit zip code.

3. [Optional] To be more precise as to which zip code is a high risk, enter the 4-digit extension to the zip code in the + field.
4. In the Description field, enter a description or reason for the high risk zip code.
5. Select or clear the Inactive check box to indicate whether the high risk zip code should be activated.
6. Click **OK**. The window is closed and record is added to the list.

Inactivate a high risk zip code

⇒ **Navigate:** On the Admin primary tab, expand the Pend Maintenance folder. Select the High Risk Zip Codes option. The zip codes are displayed on the High Risk Zip Codes page.

1. Select a zip code.
2. Click **Edit Zip Code**. The details are displayed in the Edit High Risk Zip Code window.



3. Select the Inactive check box.
4. Click **OK**. The window is closed and record is updated.

Set up pend rules

By setting up pend rules, you make it possible for the system to determine which customer orders might be fraudulent or require additional investigation. Validation occurs when an associate submits a customer order. If a customer order fails the validation check, it is automatically pending for further review. If the order is entered as part of a batch of mail orders, the order is validated when the batch is released.

Each pend rule is treated as an OR condition. If a pend rule has multiple criteria, each criterion within the rule is treated as an AND condition.




Note: In order to use the high risk zip codes and negative files as pend rule criteria, they must first be set up. Go to Admin > Pend Maintenance > High Risk Zip Codes or Admin > Pend Maintenance > Negative File.

Add a pend rule

⇒ **Navigate:** On the Admin primary tab, expand the Pend Maintenance folder. Select the Pend Rule Maintenance option. The rules are displayed on the Pend Rules page.

1. Click **Add Pend Rules**. The Add Pend Rule window is displayed.

2. In the Pend Reason field, select the reason to be applied to customer orders that fail the validation process.
 3. In the Concept field, select the concepts that you want to associate with the fraud rule.
 - To select consecutive concepts, select the first concept in the series. Press and hold the Shift key. Scroll to and select the last concept in the series. Release the Shift key.
 - To select non-consecutive concepts, select a concept. Press and hold the Ctrl key. Scroll to and select each additional concept. Release the Ctrl key.
 5. In the Rule Description field, enter a description for the pend rule.
 6. In the Pend Rule Type field, select the category in which you want to group the pend rule.
-  **Note:** The criteria listed in the criteria block changes depending on which pend rule type you select.
7. In the Multiple Pend field, indicate whether you want to allow multiple pends.
 - **Yes:** The system will pend an order again if the same pend reason occurs again. It is strongly recommended that you do not use this option when setting up fraud rules.
 - **No:** The system will not pend an order more than once for the same pend reason.
 8. Enter or select one or more of the following criteria.

Field	Description
AVS Codes	The meanings of the address verification system (AVS) codes vary depending on which payment vendor is used. If the selected AVS code is applied to a credit card payment, the order will be pended.
Payment Type	If the selected tender type is used to make a payment on an order, the order will be pended.
Order Source	If the order was entered by the selected source, the order will be pended.
Order Type	The options are Employee and Standard. If an order type is selected, orders of that type will be pended.
Order Line Type	If one or more order line types match the selected order line type, the order will be pended.
Department	If one or more items are sourced from the selected department, the order will be pended.
Return Required	If the option is Yes or No, an order is pended depending on whether the customer is required to return an item (Yes) or not (No). If the option is Ignore, the order will not be pended for this reason.
User Role	If the order is entered by an associate who is a member of the selected user role, the order will be pended.
Order Line Quantity	If the number of units entered for any order line is equal to or greater than the quantity entered, the order will be pended.
Order Total Tolerance	If the grand total of an order is equal to or greater than the amount entered, the order will be pended.
Order Line Total	If the total for any order line on an order is equal to or greater than the amount entered, the order will be pended.
High Risk Zip Codes	When Yes is selected, the zip codes on the bill-to and ship-to addresses are compared to predefined, high-risk zip codes. If there is a match, the order will be pended.
Additional Security Codes	When Yes is selected, an order will be pended if it has a credit card payment with no security code.
Negative File Match	When Yes is selected, the customer information is compared to predefined customer information in the negative file. If there is a match, the order will be pended.
Different Bill-to and Ship-to	When Yes is selected, the order will be pended if the bill-to and ship-to addresses differ in any way.
Order Header Accommodations	If the monetary value of an accommodation entered at the order header level is equal to or greater than the amount entered, the order will be pended.

Field	Description
Order Line Accommodations	If the monetary value of an accommodation entered at the order line level is equal to or greater than the amount entered, the order will be pending.

- Click **OK**. The window is closed and the pend rule is added to the list.

Edit a pend rule

⇒ **Navigate:** On the Admin primary tab, expand the Pend Maintenance folder. Select the Pend Rule Maintenance option. The rules are displayed on the Pend Rules page.

- Select a pend rule.
- Click **Edit Pend Rules**. The Edit Pend Rule window is displayed.

- Edit the details and criteria as necessary.
- Click **OK**. The window is closed and the record is updated.

No information returns

Overview

When returns are received without customer or order information, they are held in the system until resolved or purged. If a customer calls about the return, you can then research which order the return should be associated with. This is done by looking up the customer history and then accessing the order. The return is then resolved on the Order Main > Order Line tab.

Usually you want to match a no info return with a customer order. If for some reason that is not feasible or desirable, you can manually resolve the no info return without matching it to a customer order.

Procedures

Resolve no information returns

⇒ **Navigate:** On the Admin primary tab, expand the Returns folder. Select the No Customer Info option. The unresolved returns are displayed on the No Customer Info page.

The screenshot shows a window titled "No Customer Info". At the top, there are two input fields: "Total Return Qty:" with the value "5" and "Total Retail Price:" with the value "\$166.65". Below these is a table with the following columns: #, Inventory Item, Description, Return Qty, Return Date, Disposition, Return Reason Code, and Comments. The table contains three rows of data:

#	Inventory Item	Description	Return Qty	Return Date	Disposition	Return Reason Code	Comments
3	100237734	Photo Storage Boxes:Large:D...	2	06-13-2003	Broken	Did Not Like Color	No Comment
1	100237734	Photo Storage Boxes:Large:D...	2	07-08-2003	Disposed Customer...	Damaged	No Comment
2	100237048	Nightstands:Large:Black:10 F...	1	06-04-2002	Broken	Damaged	No Comment

Below the table is a large empty rectangular area. At the bottom right corner of the window, there is a button labeled "Resolve".

1. Select one or multiple returns.
2. Click **Resolve**.
3. When prompted to resolve the returns, click **OK**. The returns no longer appear on the list.

Standard and pop-up scripts

Overview

Scripts provide associates with prepared text or additional information that they can present to customers. A script becomes visible when an associate enters or selects an element that has been defined as a prompt. For example, if the prompt is a selling SKU, the script or online message appears when the designated selling SKU is added to a customer order.

Scripts can be displayed to associates in one of the following ways:

- Standard:** When triggered, the script is displayed on the right side of the application toolbar during order entry. Once triggered, the script remains visible until an order line is cancelled (if the order line was the trigger) or the customer order is cleared, submitted, pended, or cancelled. Scripts are displayed only when the Order Entry primary tab is displayed. If another script is triggered, it is appended to the previous script. An associate can scroll through the active scripts.
Scripts may also appear in the Personalization Entry window and the Monogramming Entry window. These windows are accessed when an item for which these attributes exist is added to an order line.
- Pop-up:** A pop-up script is also referred to as an online message or a product message. When triggered, the script is displayed in a small pop-up window.

Procedures

Set up standard scripts

⇒ **Navigate:** On the Admin primary tab, expand the Scripting folder. Select the Standard option. The standard scripting messages are displayed on the Standard Scripting page.

- Click **Add Message**. The Scripting Message window is displayed.



- In the Concept and Channel fields, select the concept and channel type associated with the script.
- In the Description field, enter a description for the script.
- In the Start Date and End Date fields, enter the period of time during which the script is valid. Enter the dates, or click **Cal** and select the dates.



Note: If you select a prompt that has a predefined start and end date, those dates become the default start and end dates for the script. You can overwrite the default dates if necessary.

5. In the Prompt field, select the element that triggers the script.
6. In the Prompt Condition field, enter or select the value of the prompt.
7. In the Script field, enter the text that will be displayed to associates when the script is triggered.
8. Click **OK**. The window is closed and the record is added to the list of scripts.

Set up pop-up scripts

⇒ **Navigate:** On the Admin primary tab, expand the Scripting folder. Select the Pop-Up option. The pop-up scripting messages are displayed on the Pop-Up Scripting page.

1. Click **Add Message**. The Scripting Message window is displayed.



2. In the Concept and Channel fields, select the concept and channel type associated with the script.
3. In the Description field, enter a description for the script.
4. In the Start Date and End Date fields, enter the period of time during which the script is valid. Enter the dates, or click **Cal** and select the dates.



Note: If you selected a prompt that has a predefined start and end date, those dates become the default start and end dates for the script. You can overwrite the default dates if necessary.

5. In the Prompt field, select the element that triggers the script.
6. In the Prompt Condition field, enter or select the value of the prompt.
7. In the Script field, enter the text that will be displayed to associates when the script is triggered.
8. Click **OK**. The window is closed and the record is added to the list on the Pop-Up Scripting page.

Marketing materials

Overview

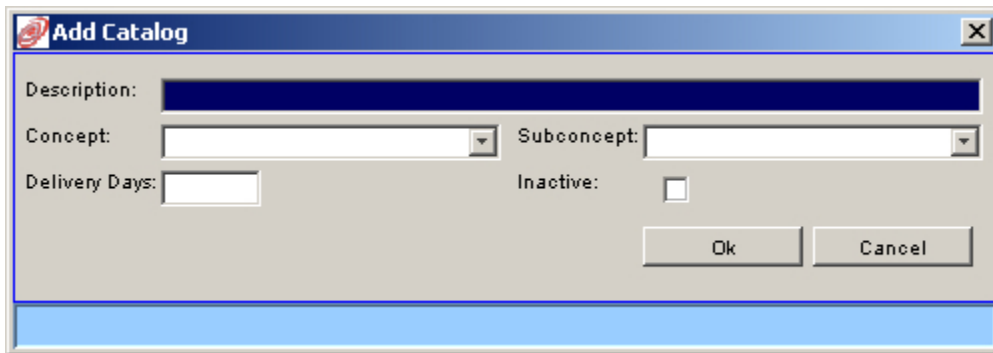
Associates may enter requests from customers for a variety of marketing materials. This can include catalogs, coupons, brochures, newsletters, and so on. It is necessary to identify which materials should be made available to customers.

Procedures

Add marketing materials

⇒ **Navigate:** On the Admin primary tab, expand the System Administration folder. Select the Catalog Request Maintenance option. The available marketing materials are displayed on the Catalog Request Maintenance page.

1. Click **Add Catalog**. The Add Catalog window is displayed.



2. In the Description field, enter the description or name of the marketing material.
3. In the Concept and Subconcept field, select the concept and subconcept that the marketing material is restricted to.
4. In the Delivery Days field, enter the number of days it takes for the marketing material to be delivered from the day it is requested.



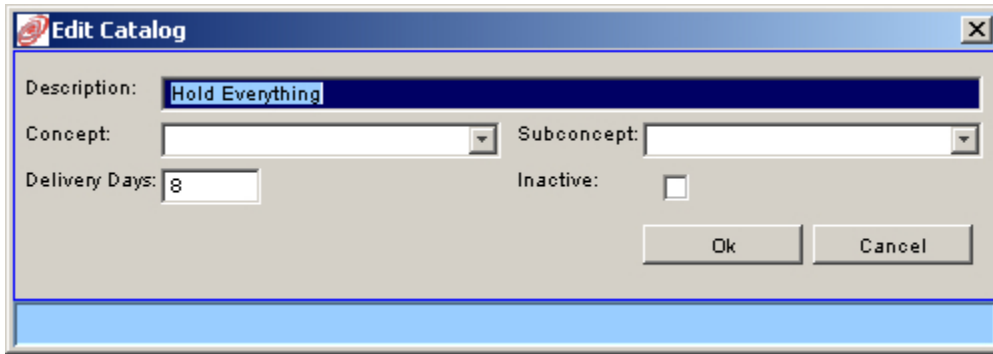
Note: The system uses this number to calculate the estimated customer delivery date.

5. Click **OK**. If active, the marketing material becomes visible and available to associates.

Inactivate marketing materials

⇒ **Navigate:** On the Admin primary tab, expand the System Administration folder. Select the Catalog Request Maintenance option. The marketing materials are displayed on the Catalog Request Maintenance page.

1. Select a marketing material.
2. Click **Edit Catalog**. The Edit Catalog window is displayed.



The screenshot shows a standard Windows-style dialog box titled "Edit Catalog". It contains the following elements:

- Description:** A text box containing "Hold Everything".
- Concept:** A dropdown menu.
- Subconcept:** A dropdown menu.
- Delivery Days:** A text box containing the number "8".
- Inactive:** An unchecked checkbox.
- Buttons:** "Ok" and "Cancel" buttons at the bottom right.

3. Select the Inactive check box.
4. Click **OK**. The window is closed and the record is updated. The marketing material is no longer visible to associates.

System/concept parameters

Overview

The system parameters allow you to optimize how the system must work in order to provide the most value. While system parameters affect the entire system, concept parameters are limited to controlling specific concepts. This provides some degree of flexibility across the system.

Procedures

Set up system parameters

⇒ **Navigate:** On the Admin primary tab, expand the System Administration folder. Select the System Parameters option. The System Parameters and Concept Parameters page is displayed.

1. Select or enter data in the appropriate fields of the System Parameters block.
2. When finished, click **Submit System Parameters**.

The following parameters are available on the System Parameters block.

System Parameters	Description
Match Code Functionality Active	Select the check box to turn on match code functionality. To set up match code rules, you must go to the Match Code Maintenance page.
Shipping & Handling Tax Code	Enter the code used to communicate shipping and handling charges to a third-party tax application.
Gifting Tax Code	Enter the code used to communicate gifting charges to a third-party tax application.
Personalization Tax Code	Enter the code used to communicate personalization and monogramming charges to a third-party tax application.
Default Fulfillment Value	

Set up concept parameters

⇒ **Navigate:** On the Admin primary tab, expand the System Administration folder. Select the System Parameters option. The System Parameters and Concept Parameters page is displayed.

1. In the Concept field of the Concept Parameters block, select the concept whose parameters you want to set up.
2. Select or enter data in the appropriate fields of the Concept Parameters block.
3. When finished, click **Submit Concept Parameters**.

Call centers

Overview

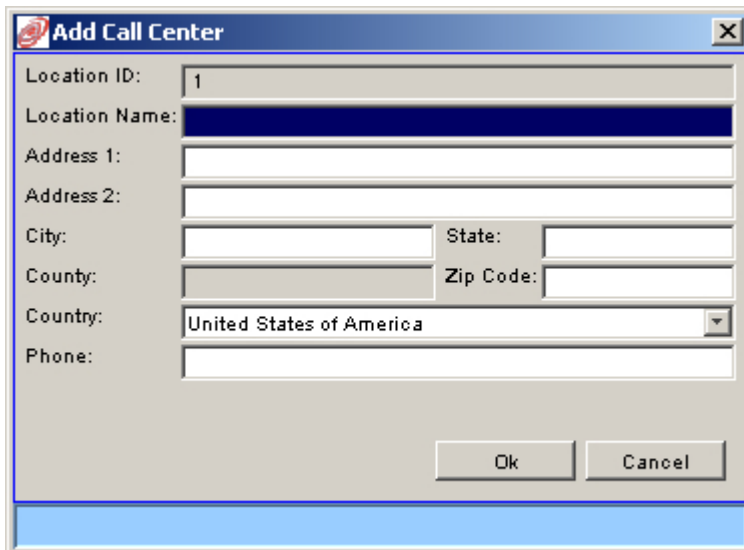
Daily messages can be sent to any call center that is known to the system. You can maintain the name, address, and telephone number of each call center. After a call center is set up, it appears as a separate secondary tab under the Daily Messages primary tab. Daily messages can be sent specifically to the new call center. The call center also receives any messages designated for all locations.

Procedures

Add a call center

⇒ **Navigate:** On the Admin primary tab, expand the System Administration folder. Select the Call Center Locations option. A list of call centers is displayed on the Call Center Locations page.

1. Click **Add Call Center Location**. The Add Call Center window is displayed.



2. In the Location Name field, enter the name of the call center. This is the name that appears on the call center secondary tabs on the Message Center primary tab.
3. Enter the address of the call center in the appropriate fields.
4. You can skip the City and State fields. When you enter a zip code in the Zip Code field, the city and state are automatically entered. If the zip code refers to more than one location, you can select the desired location from the City/State Selection window when it appears.
5. In the Country field, select the country in which the call center is located.
6. In the Phone field, enter the primary phone number of the call center. Enter the digits only.
7. Click **OK**. The call center is added to the list. The call center becomes visible to associates when they access the Message Center primary tab.

Edit a call center

⇒ **Navigate:** On the Admin primary tab, expand the System Administration folder. Select the Call Center locations option. A list of call centers is displayed on the Call Center Locations page.

1. Click **Edit Call Center Location**. The Edit Call Center window is displayed.

The screenshot shows a Windows-style dialog box titled "Edit Call Center". It contains the following fields and values:

- Location ID: 1009
- Location Name: Minneapolis
- Address 1: 950 Nicollet Mall
- Address 2: (empty)
- City: Minneapolis
- State: MN
- County: HENNEPIN
- Zip Code: 55403
- Country: United States of America (dropdown menu)
- Phone: (612) 587-5555

At the bottom right, there are two buttons: "Ok" and "Cancel".

2. Edit the enabled fields as necessary.
3. Click **OK**. The record is updated.

Work Lists

Overview

There are a variety of tasks unrelated to capturing and maintaining orders that must be completed in order to satisfy customer expectations. These tasks are typically not addressed while on the telephone with the customer. They do, however, need to be managed, prioritized, and resolved. The tasks belong to one of the following categories:

- Pended orders that required require research, editing, and approval.
- Activity requests from associates that require research on items and orders.
- Activity requests from customers requesting additional information or collateral.
- Personal reminders entered by associates, which may be associated with orders and activity requests but could be for other reasons.

In order to activate worklist functionality, it is necessary to:

- Set up tasks
- Assign tasks to pend reasons
- Assign tasks to activity request types

Procedures

Set up tasks

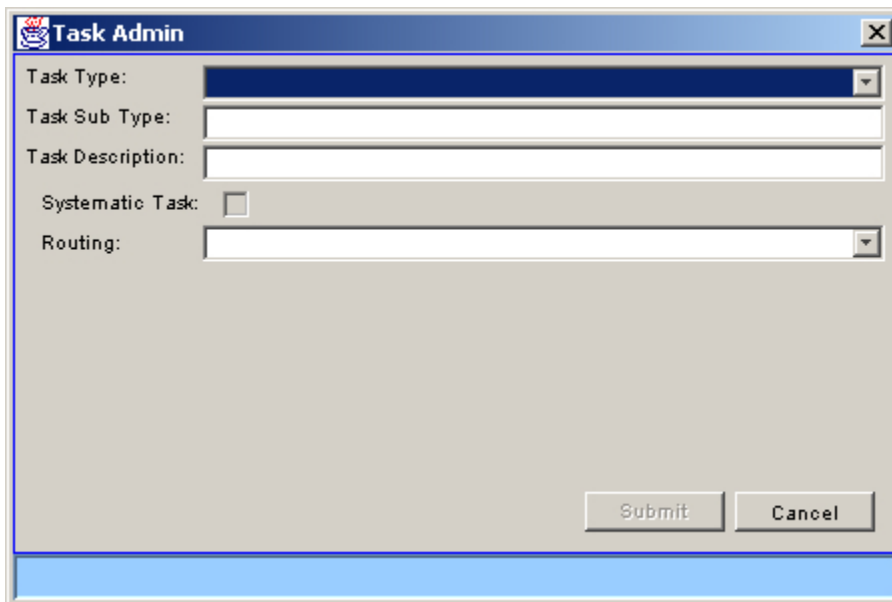
By setting up tasks, you associate a task with a task type. The task types include Personal Reminder, Activity Requests, Additional Review, General Pend, and Supervisor Approval. While Personal Reminder and Activity Request are self-explanatory, the remaining task types are related to pending orders.

In addition to associating a task with task types, you indicate where the task should be routed to. Tasks can be routed to the appropriate worklist (based on the task type), the Personal Reminders window, or to a print file.

Add a task

⇒ **Navigate:** On the Admin primary tab, expand the Worklist folder. Select the Task Maintenance option. The tasks are displayed on the Worklist Task Maintenance page.

1. Click **Add**. The Task Admin window is displayed.

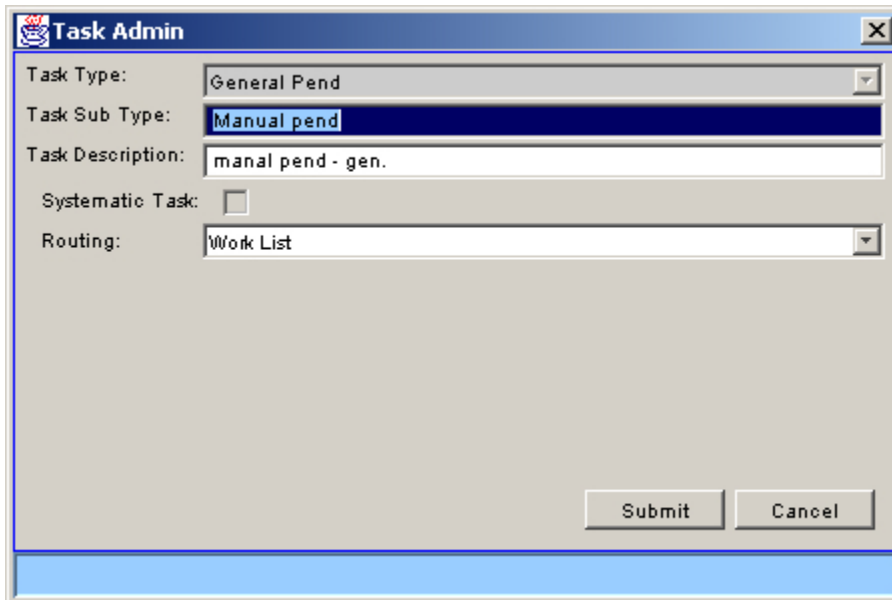


2. In the Task Type field, select the type of task.
3. To more precisely categorize the task, enter a subcategory in the Task Subtype field.
4. In the Routing field, indicate where the task should be routed by the system.
5. Click **Submit**. The window is closed and the task is added to the list.

Edit a task

⇒ **Navigate:** On the Admin primary tab, expand the Worklist folder. Select the Task Maintenance option. The tasks are displayed on the Worklist Task Maintenance page.

1. Select a task.
2. Click **Edit**. The Task Admin window is displayed.



3. Edit the subtype, description, and routing as necessary.
4. Click **Submit**. The window is closed and the record is updated.

Assign tasks to pend reasons

When associates pend orders, they must provide a reason. Some pend reasons are installed with the program. However, you can manually add pend reasons which become visible to associates. In addition to naming the pend reason, you assign a task to it. The pend reason inherits the routing attribute of the task assigned to it. When the associate selects a reason for pending an order, the pending order is routed to where it can be acted on and resolved.



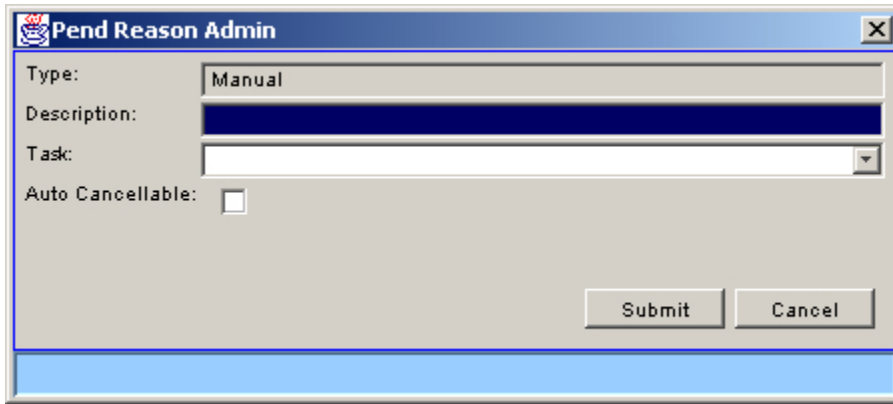
Note: Although you can not add systematic pend reasons, you can edit them.

Routing attributes are assigned to tasks elsewhere on the Admin primary tab (Admin > Worklist > Task Maintenance).

Add a pend reason

⇒ **Navigate:** On the Admin primary tab, expand the Pend Maintenance folder. Select the Pend Reason Maintenance option. The pend reasons are displayed on the Pend Reason Maintenance page.

1. Click **Add**. The Pend Reason Admin window is displayed.



The screenshot shows a window titled "Pend Reason Admin". It contains the following fields and controls:

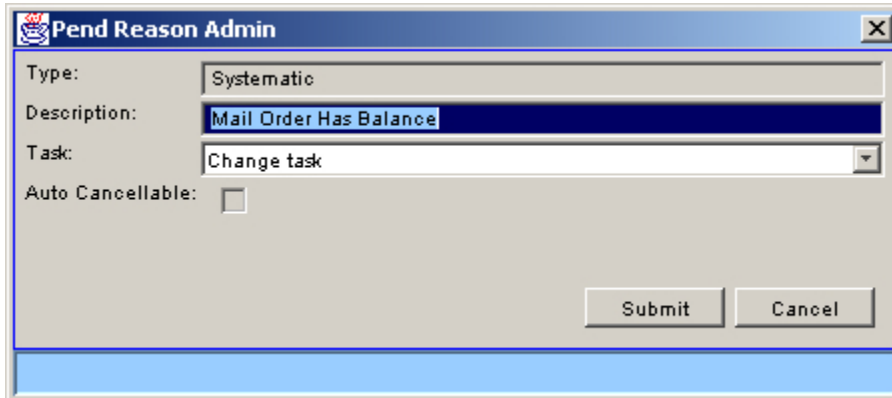
- Type:** A dropdown menu with "Manual" selected.
- Description:** A text input field.
- Task:** A dropdown menu.
- Auto Cancellable:** A checkbox that is currently unchecked.
- Buttons:** "Submit" and "Cancel" buttons at the bottom right.

2. In the Description field, enter the text of the pend reason.
3. In the Task field, select which task you want to assign to the pend reason.
4. To indicate whether the task should be cancelled automatically after it is routed, select the Auto Cancellable check box.
5. Click **Submit**. The window is closed and the pend reason is added to the list.

Edit a pend reason

⇒ **Navigate:** On the Admin primary tab, expand the Pend Maintenance folder. Select the Pend Reason Maintenance option. The pend reasons are displayed on the Pend Reason Maintenance page.

1. Select a pend reason.
2. Click **Edit**. The Pend Reason Admin window is displayed.



3. Edit the pend reason (Description), task, and auto-cancel option as necessary.



Note: The Auto Cancellable check box is enabled for manual pend reasons but not for systematic pend reasons.

4. Click **Submit**. The window is closed and the record is updated.

Assign tasks to activity request types

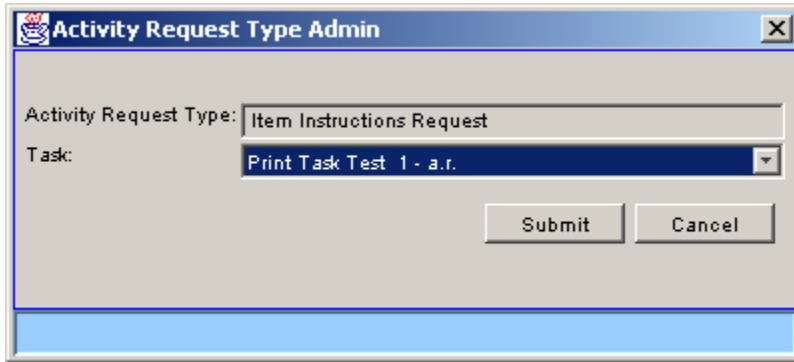
A task must be assigned to each type of activity request. The activity request type inherits the routing attribute of the task assigned to it. When associates enter an activity request, they first select the type of activity request. The activity request is routed to where it can be acted on and resolved based on the task assigned to the activity request type.

Routing attributes are assigned to tasks elsewhere on the Admin primary tab (Admin > Worklist > Task Maintenance).

Maintain activity request types

⇒ **Navigate:** On the Admin primary tab, expand the Maintain Activity Request Types folder. Select the Maintain Activity Request Types option. The types of activity request are displayed on the Activity Request Type Maintenance page.

1. Select an activity request type.
2. Click **Edit**. The Activity Request Type Admin window is displayed.



Activity Request Type Admin

Activity Request Type: Item Instructions Request

Task: Print Task Test 1 - a.r.

Submit Cancel

3. In the Task field, select which task you want to associate with the activity request type.
4. Click **Submit**. The window is closed and the activity request type is updated.

Chapter 10 – Security

Associates, or users, can perform only those tasks for which they have permission. The security administrator is responsible for assigning roles to users. Before assigning a role, you must create the role and associate a set of permissions with the role. Users are then assigned a role, and can then perform the tasks associated with it.

One or a select few users must have permission to maintain security. That user, or security administrator, is responsible for setting up roles and assigning the appropriate roles to other users.

Users are set up and maintained in a third-party application. New and updated user information is shared with RCOM.

As a security administrator, you can perform the following tasks:

- Set up roles
- Maintain role assignments

Set up roles

Overview

The Maintain Roles secondary tab allows you to create and edit the roles for users. A role is one or more permissions assigned a name. After adding roles, you must assign roles to a user.

Procedures

Add a role

⇒ **Navigate:** On the Security primary tab, select the Maintain Roles secondary tab.

1. Click **Create Role**. The Create Role window is displayed.

2. In the Role Name field, enter a unique name for the role.
3. In the Application block, select the check box next to each application for which you want to authorize access.
4. In the Inherited Role field, select an existing role that you want to copy to the new role, if any.
5. [Optional] In the Application field, select an application in order to filter which permissions are displayed.
6. Select the Granted check box next to each permission that you want to grant to the role.
7. Click **Submit**. The role is saved.

Edit a role

⇒ **Navigate:** On the Security primary tab, select the Maintain Roles secondary tab. The roles are displayed on the Security primary tab.

1. Select a role.
2. Click **Edit Role**. The Maintain Role window is displayed.

Permission	Granted
Cancel All Order Line Types	<input checked="" type="checkbox"/>
Cash Out SVC	<input type="checkbox"/>
Create Accommodations	<input checked="" type="checkbox"/>
Create and Maintain Alternative Selling Lists	<input type="checkbox"/>
Create And Maintain Items and Customers	<input checked="" type="checkbox"/>
Create and Maintain Media Drop/Source Codes	<input type="checkbox"/>
Create and Maintain Media Header	<input type="checkbox"/>
Create And Maintain Media Shipping Rates Table	<input type="checkbox"/>
Create and Maintain Product Information	<input type="checkbox"/>
Create and Maintain Selling Items	<input type="checkbox"/>
Create Cash Payments	<input type="checkbox"/>
Create Check Payments	<input checked="" type="checkbox"/>
Create Credit Card Payments	<input checked="" type="checkbox"/>
Create Gift Card Payments	<input type="checkbox"/>
Create Gift Certificate Payments	<input checked="" type="checkbox"/>
Create Merchandise Card Payments	<input type="checkbox"/>
Create Merchandise Voucher Payments	<input checked="" type="checkbox"/>
Create Partial Order Lines	<input checked="" type="checkbox"/>
Create Return, Replacement, Exchange Order Lines	<input checked="" type="checkbox"/>

3. Edit the permissions as necessary.
4. Click **Submit**. The role is updated.

Delete a role

⇒ **Navigate:** On the Security primary tab, select the Maintain Roles secondary tab. The roles are displayed on the Security primary tab.

1. Select a role.
2. Click **Remove Role**. The role no longer appears on the Security primary tab.

Maintain role assignments

Overview

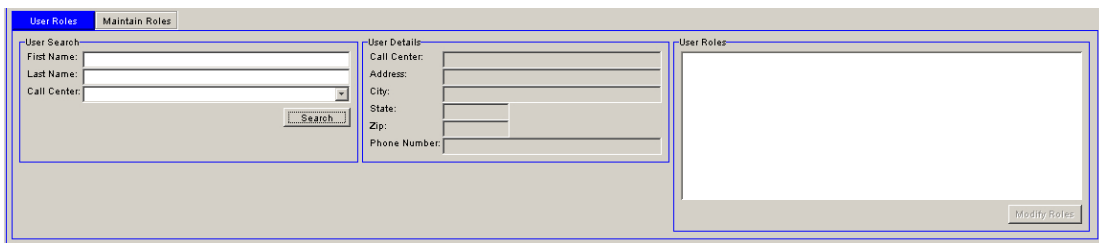
The User Roles secondary tab allows you to control the roles assigned to users. Before assigning roles, you must set up roles.

Procedures

Look up users

⇒ **Navigate:** On the Security primary tab, select the User Roles secondary tab.

1. Enter search criteria in one or more fields in the User Search block on the User Roles secondary tab.



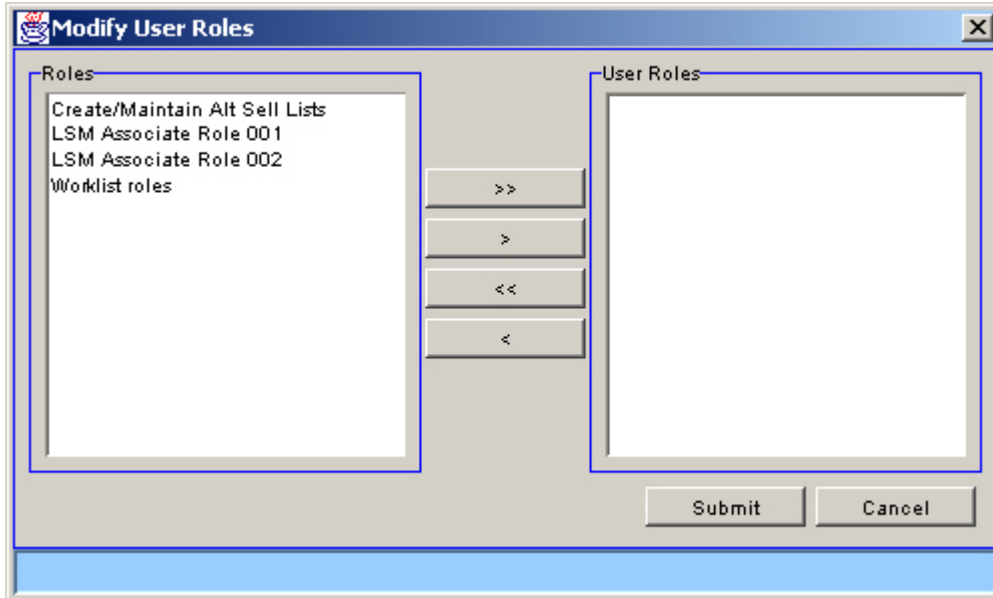
2. Click **Search**. The results are displayed on the Security primary tab.
3. Select the user that you want to edit. The details are displayed on the User Roles secondary tab.

Contact information about the user appears in the User Details block. The roles assigned to the user are displayed in the User Roles block.

Assign roles to users

⇒ **Navigate:** On the Security primary tab, select the User Roles secondary tab. Look up and select a user.

1. Click **Modify Roles**. The Modify User Roles window is displayed.



2. Select one or more roles that you want to assign to the selected user:
 - Click > to move the selected roles from the available roles list (Roles) to the assigned roles list (User Roles).
 - Click >> to move all the roles from the available roles list to the assigned roles list.
 - Click << to move the selected roles from the assigned roles list back to the available roles list.
 - Click < to move all the roles from the assigned roles list back to the available roles list.
3. Click **Submit**. The roles are updated for the user.

Wildcard searches

Wildcard searches are permitted when looking up users. The wildcard is an asterisk (*). You can place the asterisk before, after, or between one or more characters. You must enter at least one character in addition to the asterisk. Some examples of wildcard searches include:

- Enter anders* in the Last Name field to retrieve users with last names such as Anderson or Andersen.
- Enter *son in the Last Name field to retrieve users with last names such as Anderson, Carlson, and Thompson.
- Enter s*n in the First Name field to retrieve users named Steven, Stephen, Susan, and so on.