



Sterling Call Center and Sterling Store: User Guide

Fix Pack 9.1.0.1



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Preface

This manual explains the various tasks that can be performed using IBM® Sterling Call Center and IBM® Sterling Store.

Intended Audience

This manual is intended to provide assistance to customer service representatives who are using the Sterling Call Center and Sterling Store to capture and access information about orders. This manual is also intended for store users who capture and maintain orders after they are captured by the Sterling Call Center and Sterling Store.

Structure

This manual contains the following sections:

Chapter 1, "Using the IBM Sterling Call Center and IBM Sterling Store Dialogs and Windows"

This chapter discusses the structure of the Sterling Call Center and Sterling Store user interface and the various tasks that you can perform.

Chapter 2, "Tasks for a Customer Service Representative"

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

Chapter 3, "Tasks for a Store Representative"

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

Documentation

- *Sterling Call Center and Sterling Store: Release Notes*
- *Sterling Call Center and Sterling Store: Concepts*
- *Sterling Selling and Fulfillment Suite: Applications Installation Guide*
- *Sterling Call Center and Sterling Store: Deployment Guide*
- *Sterling Selling and Fulfillment Suite: Applications Reference Implementation Guide*
- *Sterling Call Center and Sterling Store: Implementation Guide*
- *Sterling Selling and Fulfillment Suite: Applications Configuration Guide*
- *Sterling Call Center and Sterling Store: User Guide*
- *Sterling Call Center and Sterling Store: Upgrade Guide*
- *Sterling Call Center and Sterling Store: Business Intelligence Operational Reports Guide*
- *Sterling Call Center and Sterling Store: Javadocs*

For more information about the IBM® Sterling Selling and Fulfillment Foundation components, see the following manuals:

- *Sterling Selling and Fulfillment Foundation: Release Notes*
- *Sterling Selling and Fulfillment Foundation: Installation Guide*
- *Sterling Selling and Fulfillment Foundation: Upgrade Guide*
- *Sterling Selling and Fulfillment Foundation: Configuration Deployment Tool Guide*
- *Sterling Selling and Fulfillment Foundation: Performance Management Guide*
- *Sterling Selling and Fulfillment Foundation: High Availability Guide*
- *Sterling Selling and Fulfillment Foundation: System Management Guide*
- *Sterling Selling and Fulfillment Foundation: Localization Guide*
- *Sterling Selling and Fulfillment Foundation: Customization Basics Guide*

- *Sterling Selling and Fulfillment Foundation: Customizing APIs Guide*
- *Sterling Selling and Fulfillment Foundation: Customizing Console JSP Interface for End User Guide*
- *Sterling Selling and Fulfillment Foundation: Customizing the RCP Interface Guide*
- *Sterling Selling and Fulfillment Foundation: Customizing User Interfaces for Mobile Devices Guide*
- *Sterling Selling and Fulfillment Foundation: Customizing Web UI Framework Guide*
- *Sterling Selling and Fulfillment Foundation: Customizing Swing Interface Guide*
- *Sterling Selling and Fulfillment Foundation: Extending the Condition Builder Guide*
- *Sterling Selling and Fulfillment Foundation: Extending the Database Guide*
- *Sterling Selling and Fulfillment Foundation: Extending Transactions Guide*
- *Sterling Selling and Fulfillment Foundation: Using Sterling RCP Extensibility Tool Guide*
- *Sterling Selling and Fulfillment Foundation: Integration Guide*
- *Sterling Selling and Fulfillment Foundation: Product Concepts Guide*
- *Sterling Warehouse Management System: Concepts Guide*
- *Sterling Selling and Fulfillment Foundation: Application Platform Configuration Guide*
- *Sterling Distributed Order Management: Configuration Guide*
- *Sterling Supply Collaboration: Configuration Guide*
- *Sterling Global Inventory Visibility: Configuration Guide*
- *Catalog Management: Configuration Guide*
- *Sterling Logistics Management: Configuration Guide*
- *Sterling Reverse Logistics: Configuration Guide*
- *Sterling Warehouse Management System: Configuration Guide*

- *Sterling Selling and Fulfillment Foundation: Application Platform User Guide*
- *Sterling Distributed Order Management: User Guide*
- *Sterling Supply Collaboration: User Guide*
- *Sterling Global Inventory Visibility: User Guide*
- *Sterling Logistics Management: User Guide*
- *Sterling Reverse Logistics: User Guide*
- *Sterling Warehouse Management System: User Guide*
- *Sterling Selling and Fulfillment Foundation: Mobile Application User Guide*
- *Sterling Selling and Fulfillment Foundation: Business Intelligence Operational Reports Guide*
- *Sterling Selling and Fulfillment Foundation: Javadocs*
- *Sterling Selling and Fulfillment Suite: Glossary*
- *Parcel Carrier: Adapter Guide*
- *Sterling Selling and Fulfillment Foundation: Multitenant Enterprise Guide*
- *Sterling Selling and Fulfillment Foundation: Password Policy Management Guide*
- *Sterling Selling and Fulfillment Foundation: Properties Guide*
- *Catalog Management: Concepts Guide*
- *Sterling Selling and Fulfillment Foundation: Pricing Concepts Guide*
- *Sterling Selling and Fulfillment Foundation: Setting Up Quotes in Distributed Order Management*
- *Sterling Sensitive Data Capture Server, Release 1.0: Configuration Guide*
- *Sterling Sensitive Data Capture Server, Release 1.0: PA-DSS Implementation Guide*
- *Sterling Selling and Fulfillment Foundation: Secure Deployment Guide*
- *Sterling Business Center: Item Administration Guide*

- *Sterling Business Center: Pricing Administration Guide*
- *Sterling Business Center: Customization Guide*
- *Sterling Business Center: Localization Guide*
- *Sterling Field Sales: Deployment Guide*
- *Sterling Field Sales: Implementation Guide*
- *Sterling Field Sales: Localization Guide*
- *Sterling Field Sales: User Guide*
- *Sterling Field Sales: Customization Guide*
- *Visual Modeler: Administration Guide*
- *Visual Modeler: Best Practices Guide*
- *Visual Modeler: Implementation Guide*
- *Visual Modeler: Installation Guide*
- *Visual Modeler: Tutorial Guide*

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

`<INSTALL_DIR>/documentation/YCD_doc_home.html`

`<INSTALL_DIR>` is the directory where Sterling Call Center and Sterling Store and the Sterling Selling and Fulfillment Foundation are installed.

Conventions

The following conventions may be used in this manual:

Convention	Meaning
...	Ellipsis represents information that has been omitted.
< >	Angle brackets indicate user-supplied input.
mono-spaced text	Mono-spaced text indicates a file name, directory path, attribute name, or an inline code example or command.

Convention	Meaning
/ or \	Slashes and backslashes are file separators for Windows, Unix, and Linux operating systems. The file separator for the Windows operating system is "\" and the file separator for UNIX and Linux systems is "/". The Unix convention is used unless otherwise mentioned.
<INSTALL_DIR>	User-supplied location of the Sterling Selling and Fulfillment Foundation installation directory and Sterling Call Center and Sterling Store installation directory. This is only applicable for Release 8.0.
<ANALYTICS_HOME>	User-supplied location of the Sterling Call Center and Sterling Store Business Intelligence Operational Reports installation directory. Note: This convention is used only in the <i>Sterling Call Center and Sterling Store: Business Intelligence Operational Reports Guide</i> .
<COGNOS_HOME>	User-supplied location of the Cognos installation directory. Note: This convention is used only in the <i>Sterling Call Center and Sterling Store: Business Intelligence Operational Reports Guide</i> .

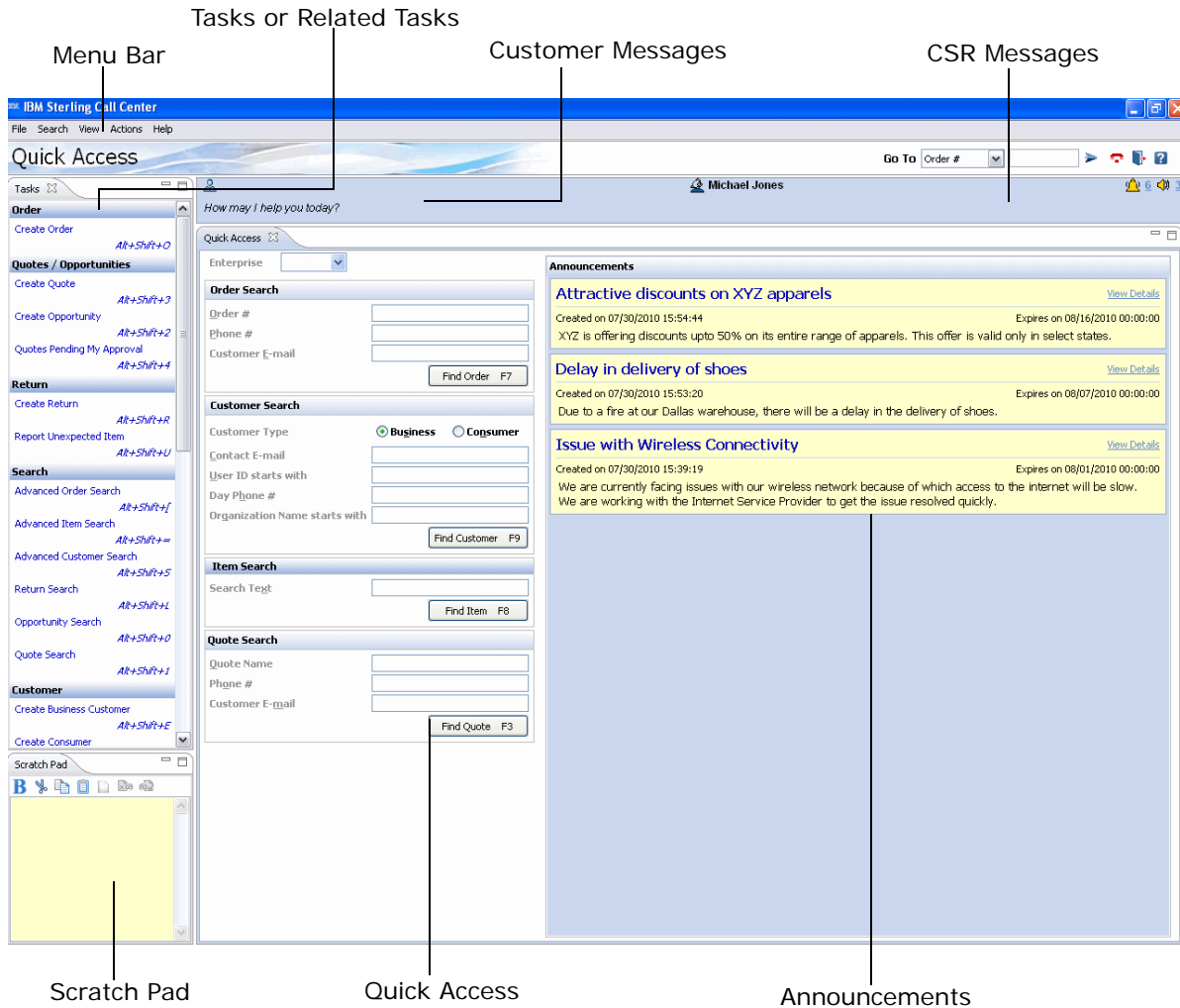
Using the IBM Sterling Call Center and IBM Sterling Store Dialogs and Windows

To get the most out of Sterling Call Center and Sterling Store, it is important to understand the structure of Sterling Call Center and Sterling Store and how it can best work to meet your business requirements.

This chapter discusses the structure of the Sterling Call Center and Sterling Store user interface and the various tasks that you can perform using this application.

[Figure 1–1](#) illustrates the layout of the client application user interface.

Figure 1–1 Layout of the Client Application User Interface



The Sterling Call Center and Sterling Store dialog elements provide:

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

- Customer Messages—Each screen in Sterling Call Center and Sterling Store displays appropriate customer messages to assist you in handling customer interaction smoothly. The customer's name is displayed in the customer message panel, for example, the Quick Access screen has the following customer message:



How may I help you today?

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

- CSR Messages—Each screen in the Sterling Call Center and Sterling Store has some CSR messages associated with it.



Customer Service Representative





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0

There were no results matching your search criteria.








The messages on this panel display feedback about the tasks being performed and the updates that occur in the application. The number adjacent to the  (alerts) icon indicates the current number of open alerts. The panel also notifies users of newly assigned alerts. For more information about alert notifications, see [Section 2.11.4, "Notifying Users of Assigned Alerts"](#). Additionally the number adjacent to the  (announcements) icon indicates the number of latest announcements that are available.


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

- Tasks/Related Tasks—This panel displays all the tasks and the related tasks that you can perform.
- Scratch Pad—This panel allows you to jot down information during a call, copy information from one screen to another screen, and refer to the information later. The scratch pad can either be displayed within

the Related Tasks panel or in a pop-up window. You can also hide or display the scratch pad by either using the corresponding option from the View menu or with an appropriate hot key. [Table 1–1](#) describes the icons provided for performing certain basic functions in the scratch pad.

Table 1–1 Scratch Pad Icons


Icon	Function
	Highlight text in bold.
	Cut the selected text.
	Copy the selected text.
	Paste the cut or copied text.
	Clear the contents of the scratch pad.
	Reverse the last action that was performed within the scratch pad.
	Reverse the last Undo action within the scratch pad.

Note: When you click the  icon, a "Data may be lost!" warning message is displayed. Click Yes to clear the contents. Otherwise, click No.

- Quick Access—This panel provides visibility to orders, customers, items, and quotes.
- Announcements—This panel displays all the announcements that have been created. Users who belong to a user group that has the necessary permissions can view the announcements panel.
- Dialog Buttons—[Table 1–2](#) describes the commonly used dialog buttons.

Table 1–2 Dialog Buttons

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

- Help Assistant—This panel provides instructions about the tasks that you can perform in the corresponding screen. The How Do I panel lists all the tasks that you can perform. Click the Icon Legends hyperlink to view the details of the icons in the corresponding screen. Click the Back To Index hyperlink to return to the index page. Click the  icon to close the Help Assistant screen. You can also use the Esc key to close the Help Assistant screen.

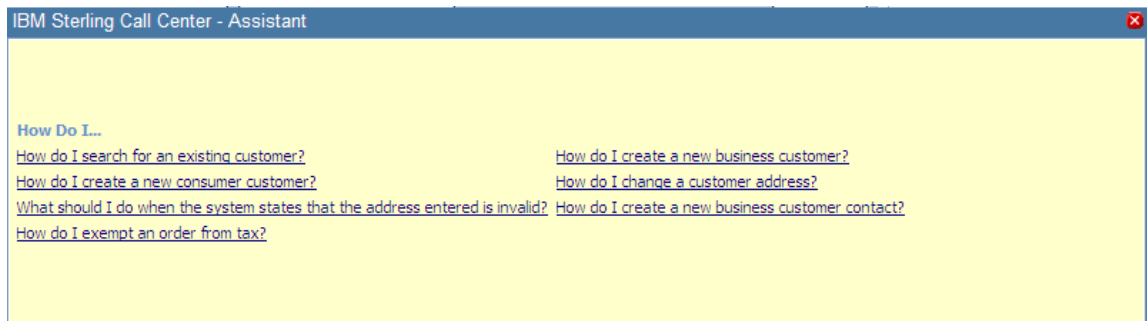


Table Navigation—If the size of table column is small, then you can see the complete text by placing the cursor over the column.

Note: Press Tab to traverse out of a text box in any screen in the Sterling Call Center and Sterling Store.

1.1 Utilizing the Keyboard Shortcuts and Hot Keys

Sterling Call Center and Sterling Store provides keyboard shortcuts and hot keys to help you work quickly. Some of these keys are available only during certain processes or operations. To invoke any action using hot keys, ensure that the focus is on any editor other than the Related Tasks panel. To view a list of hot keys and keyboard shortcuts supported by Sterling Call Center and Sterling Store, press Ctrl+Shift+L in any screen.

1.2 Applying Filters on Order Lines

Sterling Call Center and Sterling Store supports filtering of order lines from any screen that displays a list of order lines. In the screen where you can view the order lines for an order, right-click to apply a filter on the order lines.

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

1.3 Supported Resolutions

Sterling Call Center and Sterling Store supports resolutions of 800 X 600 pixels and 1024 X 768 pixels.

2

Tasks for a Customer Service Representative

The role of a Customer Service Representative (CSR) is to capture and maintain orders through Sterling Call Center and Sterling Store. The CSR typically deals with customers directly and takes the necessary action on an order in response to a telephone call or an e-mail message. CSRs are often required to investigate the alerts that are raised for orders that cannot be validated, or require special handling.

For more information about the general tasks that can be performed by a CSR through Sterling Call Center and Sterling Store, such as applying filters on order lines or utilizing keyboard shortcuts and function keys, see [Chapter 1, "Using the IBM Sterling Call Center and IBM Sterling Store Dialogs and Windows"](#).

Following are the tasks that a CSR performs frequently:

- [Performing Search Tasks](#)
- [Answering Frequent Queries](#)
- [Performing Order Tasks](#)
- [Performing Opportunity and Quote Tasks](#)
- [Performing Fulfillment Tasks](#)
- [Performing Price Match Tasks](#)
- [Performing Other Tasks on an Order](#)
- [Performing Customer Tasks](#)
- [Performing User Management Tasks](#)
- [Performing Return Order Tasks](#)

- [Performing Alert and Queue Management Tasks](#)
- [Performing Announcement Tasks](#)
- [Setting User Preferences](#)
- [Viewing the Documentation Library](#)
- [Performing Report Tasks](#)
- [Launching the IBM Sterling Business Center Application](#)

2.1 Performing Search Tasks

This task assumes that you need to take some action on an existing order, customer, item, or quote in the Sterling Call Center and Sterling Store. You can communicate a customer's request by means of a telephone call or an e-mail message. Generally, the customer knows the order number or has more information to help you locate the order, customer, item, or quote.

2.1.1 Searching for an Order

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

To search for an order:

1. If you have access to multiple enterprises, the Enterprise drop-down list is displayed. Select the enterprise for which you want to perform an order search.
2. Enter the complete order number, the telephone number, or the e-mail address of the customer in the Quick Access panel.
3. Click Find Order.
 - If a single order exists for the search criteria you entered, the Order Summary screen is displayed.
 - If multiple orders exist for the search criteria you entered, the Order Search screen is displayed. Enter the appropriate information in the Order Search Criteria panel. Click Search. The Order List screen is displayed. Double-click the appropriate order number. The Order Summary screen is displayed. For more


information about viewing order summary details, see [Section 2.1.4, "Viewing Order Summary"](#).

2.1.1.1 Performing an Advanced Order Search

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

To perform an advanced order search:

1. Do one of the following to open the Advanced Order Search screen:
 - From Tasks > Search, select Advanced Order Search.
 - In the Quick Access panel, enter the appropriate search criteria and click Find Order.
2. Enter the appropriate search criteria. Select the Order By option from the drop-down list based on which the records will be sorted. Select Ascending or Descending from the drop-down list and click Search. The search results are displayed in the Order List panel.

If you cannot find the pertinent order number, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

3. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed. Click the View History Records hyperlink to retrieve orders from the history table. You can click the View Recent Records hyperlink to switch back to recent records.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

4. Double-click the appropriate order number. The Order Summary screen is displayed. For more information about viewing the order summary details, see [Section 2.1.4, "Viewing Order Summary"](#).

2.1.2 Searching for a Customer

If you know the customer's e-mail address, ID, phone number or the name of the business in case of a business customer, you can use the Quick Access screen to directly navigate to the customer.

To search for a customer:

1. If you have access to multiple enterprises, the Enterprise drop-down list is displayed. Select the enterprise for which you want to perform a customer search.
2. Select the customer type.

Note: The Customer Type field is displayed based on the Order Entry rules configuration.

3. Enter the customer's e-mail address, user ID, phone number or the name of the business in case of a business customer.
4. Click Find Customer.
 - If a single customer exists for the search criteria you entered, the Customer Details screen is displayed.
 - If multiple customers exist for the search criteria you entered, the Customer Search screen is displayed. Enter the appropriate information in the Customer Search Criteria panel. Click Search.


The Customer List screen is displayed. Double-click the appropriate Customer. The Customer Details screen is displayed. For more information about viewing customer details, see [Section 2.1.2.2, "Viewing Customer Details"](#).

2.1.2.1 Performing an Advanced Customer Search

If you do not know the complete details of a customer such as the customer's id, phone number or e-mail address you can perform an Advanced Customer Search.

To perform an advanced customer search:

1. From Tasks > Search, select Advanced Customer Search.
2. Select the organization from the drop-down list.

Enter the appropriate search criteria and click Search. The search results are displayed in the Customer Search Results panel. If you cannot find the right customer, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

3. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

4. Double-click the appropriate customer record. The Customer Details screen is displayed. For more information about viewing the customer details, see [Section 2.1.2.2, "Viewing Customer Details"](#).

2.1.2.2 Viewing Customer Details

You can view the details of consumer customers and business customers.

Viewing Consumer Customer Details

In the Customer Details screen, you can view the details of the customer such as the customer's name, ID, e-mail address, phone number, date of birth, bill to address and ship to address.

Note: The Draft Orders, Order History, Return History, Opportunities, and Quote History tabs support pagination.

- The customer's name, login ID, and status are displayed in the top panel.

Note: Login cannot be changed after it has been entered and saved.

- In the Contact Information panel, you can view the customer's e-mail address, mobile phone number, day phone number, day fax number, evening phone number, evening fax number, date of birth, spouse's date of birth, and wedding anniversary.
- In the Bill To Address panel, you can view the details of the customer's bill to address.

- In the Ship To Address panel, you can view the ship to address to which orders for this customer will be sent.
- In the Draft Orders tab, you can view all the draft orders that exist for the customer.

The Channel column indicates whether the orders were created (or last modified) in the Web or Call Center. To modify or confirm a draft order, double-click the appropriate record in the list of draft orders.

- In the Order History tab, you can view the details of previous orders created for the customer. You can filter the list of orders by hold type and status. To filter by hold type, select a hold type from the Hold Type drop-down list, and click the Search button. To filter by status, select either Open, Backordered, or Shipped, and click the Search button. You can click the View History Orders hyperlink to retrieve orders from the history table. You can click the View Recent Orders hyperlink to switch back to recent records.
- In the Return History tab, you can view the details of the return orders that were created for the customer.
- In the Opportunities tab, you can view the details of the opportunities that were created for the customer.
- In the Quote History tab, you can view details of all the quotes that were created for the customer. You can filter the list of quotes based on hold type and/or status. To filter by hold type, select a hold type from the Hold Type drop-down list, and click the Search button. To filter by status, select either the Open, Closed, or All Quotes, and click the Search button.
 - Open displays quotes that have neither been abandoned nor converted to orders.
 - Closed displays quotes that have either been abandoned or converted to orders.
 - All Quotes displays all the quotes that have been created for the customer up-to-date.
- In the Addresses tab, you can view the additional addresses of the customer. Address descriptions, if any, will be displayed in the shaded panels above the addresses.
- In the Payment Methods tab, you can view the details of the payment methods assigned to the customer.

Note: The Payment Methods panel is displayed based on the configuration.

- In the Important Notes panel, you can view and add additional information about the customer. For more information about viewing or adding notes, see [Section 2.8.12, "Viewing and Adding Customer Notes and Contact Notes"](#).

Viewing Business Customer Details

In the Business Customer Details screen, you can view the details of the business customer, such as the customer's name, ID, bill to address, and ship to address.

Note: The Draft Orders, Order History, Return History, Opportunities, and Quote History tabs support pagination.

- The customer's business name, customer ID, and status are displayed in the top panel. You can click on the customer's business name to access the customer's Web site, if available, which will open in the default browser.

Note: If the status of the parent business customer changes to Inactive or On Hold, the status of the business customer and business customer contacts also changes to Inactive or On Hold, as appropriate.

Note: Customer ID and Login cannot be changed after they have been entered and saved.

- In the Bill To Address panel, you can view the details of the customer's bill to address.
- In the Ship To Address panel, you can view the ship to address to which orders for the customer will be sent.

- In the Sold To Address panel, you can view the address details of the buyer.
- In the Contacts tab, you can view the list of contacts that exist for the business customer. To view details about a contact, either double-click a contact in the list, or click the View Contact Details hyperlink in the details panel.
- In the Draft Orders tab, you can view all the draft orders that exist for the customer.

The Channel column indicates whether the orders were created (or last modified) in the Web or Call Center. To modify or confirm a draft order, double-click the appropriate record in the list of draft orders.

- In the Order History tab, you can view the details of previous orders created for the customer. You can filter the list of orders by hold type and status. To filter by hold type, select a hold type from the Hold Type drop-down list, and click the Search button. To filter by status, select either Open, Backordered, or Shipped, and click the Search button. You can click the View History Orders hyperlink to retrieve orders from the history table. You can click the View Recent Orders hyperlink to switch back to recent records.
- In the Return History tab, you can view the details of the return orders that were created for the customer.
- In the Opportunities tab, you can view the details of the opportunities that were created for the customer.
- In the Quote History tab, you can view details of all the quotes that were created for the customer. You can filter the list of quotes based on hold type and/or status. To filter by hold type, select a hold type from the Hold Type drop-down list, and click the Search button. To filter by status, select either the Open, Closed, or All Quotes, and click the Search button.
 - Open displays quotes that have neither been abandoned nor converted to orders.
 - Closed displays quotes that have either been abandoned or converted to orders.
 - All Quotes displays all the quotes that have been created for the customer up-to-date.

- In the Addresses tab, you can view the additional addresses of the customer. Address descriptions, if any, will be displayed in the shaded panels above the addresses.
- In the Payment Methods tab, you can view the details of the payment methods assigned to the customer.

Note: The Payment Methods panel is displayed based on the configuration.

- In the Child Customers tab, you can view the list of child customers belonging to the current customer. To view a child customer's details, double-click the child customer. To view the parent customer's details, click the Parent Customer hyperlink.
- In the Important Notes panel, you can view and add additional information about the customer. For more information about viewing or adding notes, see [Section 2.8.12, "Viewing and Adding Customer Notes and Contact Notes"](#).

2.1.2.3 Viewing Customer Contact Details

You can view the consumer contact details directly from the Consumer Details screen.

To view the contact details pertaining to a business customer, double-click a contact in the Contacts list of the Business Customer Details screen or click the View Contact Details hyperlink in the contact information display panel. The Contact Details screen is displayed.

In the Contact Details screen, you can view the following details pertaining to the customer contact, such as the contact's name, ID, bill to address, and ship to address:

- The contact's name, ID, and status are displayed in the top panel.
- In the Contact Information panel, you can view the contact's e-mail address, day phone number, evening phone number, day fax number, evening fax number, mobile phone number, job title, department, date of birth, spouse's date of birth, wedding anniversary, and spending limit.
- In the Bill To Address panel, you can view the details of the contact's bill to address.

- In the Ship To Address panel, you can view the details of the contact's ship to address.
- In the Sold To Address panel, you can view the details of the contact's sold to address.
- The panel below the address panels displays information about the approving user and backup approver.

An approving user can approve an order for a contact who has exceeded his or her spending limit. A backup approver can approve orders for the contact if the contact is unavailable.


- In the Important Notes panel, you can view and add additional information about the customer contact. For more information about viewing or adding notes, see [Section 2.8.12, "Viewing and Adding Customer Notes and Contact Notes"](#).

2.1.3 Searching for an Item

Using the Quick Access screen you can search for an item. Search can be performed for items or independent services by entering the appropriate search criteria for the item. You can also search for items based on specification.

To search for an item:

1. If you have access to multiple enterprises, the Enterprise drop-down list is displayed. Select the enterprise for which you want to perform an item search.
2. Enter the search criteria pertaining to an item.
3. Click Find Item.
 - If a single item exists that matches the search criteria, the Item Details screen is displayed.
 - If multiple items exist that match the search criteria, the Item Search screen is displayed with a list of product items.

If the search criteria does not match with any item, the Advanced Item Search screen is displayed. Click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task. Based on the configuration, either the Search Through All Items panel or the Search Items Currently Being Sold panel is displayed in the Advanced Item Search screen. If the Advanced Item Search

screen is configured to allow the both the panels, the Search Through All Items panel is displayed and a Switch To Search Through All Items hyperlink is displayed which will allow you to switch between both the panels.

Search Through All Items Panel

In the Search Through All Items panel, you can search for items using the identifier of the item or the alternate identifier, description of the item, or the manufacturer's name of the pertinent item.

Search Items Currently Being Sold Panel

In the Search Items Currently Being Sold panel, you can search for items based on the enterprise. Select an enterprise from the Enterprise drop-down list. You can enter a search criteria for the item, specify a price range, and also search for items based on entitlements.

To view the item details, select the item and double-click, or in the Preview panel click the Item ID hyperlink. The Item Detail screen is displayed.

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

2.1.3.1 Viewing Product Item Details

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

To view the details of a product item:

1. In the Availability panel, select the country or region name from the drop-down list from where the customer wants to check the availability of the items and enter the postal code.

Note: The availability of the bundle parent item depends on the availability of the bundle component items.

2. Click Get Availability. The total quantity of the item that is available in the postal code is displayed in the Available Quantity field.

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

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

3. If you want to view more details of the item, click More Details. The More Details Of Selected Item screen is displayed.
4. If you are viewing the details of a model item, the View Style Items hyperlink is displayed. Click this hyperlink to select an item's style. For more information about selecting an item's style, see [Section 2.3.1.3, "Selecting an Item's Style"](#).
5. If the Sterling Call Center and Sterling Store application is configured to display the URL of a product Web page pertaining to an item, the View Product Web Page hyperlink is displayed. Click the View Product Web Page hyperlink to view the Web site providing details of the item.
6. If you want to add the item to the order, click Add to Order.

Note: You can configure the country or region drop-down to ensure that it does not display on the screen. For more information about configuring the country or region display, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

2.1.3.2 Viewing the Service Item Details

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

To view the details of a service item:

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

2.1.3.3 Viewing More Details of the Selected Product Items

You can view more details of the selected product items.

- To view more information about the item's accessories, click the Accessories tab. You can view the identifier of the item or the alternate item, the item's description, associated quantity, and the unit price of all accessories associated with the item.
- To view the bundle component item details, click the Component Details tab. You can view the bundle component items, item's description, and the bundle item kit quantity.
- To view the item's specifications, click the Specifications tab.
- To view the items available for upsell, click the Upsell tab. You can view the identifier of the item or the alternate item, the item's description, associated quantity, and the unit price of all items for upsell.
- To view the items available for substitutions, click the Substitutions tab. You can view the identifier of the item or the alternate item, item's description, associated quantity, and the unit price of all items for substitutions.
- To view the service options of an item, click the Service Options tab. You can view the identifier of the service item, item's description, associated quantity, whether the service scheduling

must be held until the item is delivered, the service time offset in hours (difference between provided service and product delivery), and the unit price of all the services available for the item.

- To view the instructions pertaining to an item, click the Instructions tab. You can view the sequence number of the instructions, the instruction type, and the instructions pertaining to the item.

2.1.3.4 Performing an Advanced Item Search


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

To perform an advanced item search:

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

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

2. Select an item in the Item List panel to view more information about the item in the Item Details panel.
 - If you select a product, you can view the identifier of the item, item's description, unit of measure, availability, and unit price.
 - If you select an independent service, you can view the identifier of the item, item's description, unit of measure, and unit price.

If you cannot find the items that you are searching for, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

3. Choose any one of the following and click Search:
 - Products—Provides a list of items
 - Independent Services—Provides a list of services
 - Both—Provides a list of items and services

4. If you are unable to find the pertinent items, click Show Search Criteria to enter more restrictive search criteria.
5. If you select a model item and click the Add to Order button, the Style Items pop-up window is displayed. For more information about selecting an item's style, see [Section 2.3.1.3, "Selecting an Item's Style"](#).
6. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

7. Double-click on the required item to view the item details.

2.1.4 Viewing Order Summary

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

To view the summary of an order:

1. Perform one of the following tasks to open the Order Summary screen:





- From the Quick Access screen, enter the complete order number, the customer's telephone number, or the customer's e-mail address and click Find Order.
- If you do not enter the complete order number, the Order Search screen is displayed. Enter the appropriate information in the Order Search Criteria panel. Click Search. The Order List screen is displayed. Double-click the appropriate order number. The Order Summary screen is displayed.

Note: Based on the compatibility level of an order with the version of the Sterling Call Center and Sterling Store application being used, the corresponding Order Summary screen is displayed:

- If the order is compatible with the version of the application, the Order Summary screen is displayed.
 - If the order is partially compatible with the version of the application, the Order Summary screen is displayed, but with only the nonorder-related tasks.
 - If the order is not compatible with the version of the application, the Order Summary screen is displayed with most of the tasks disabled. For more information about viewing the Order Summary screen in the context of incompatible orders, see [Viewing Order Summary for Incompatible Orders](#).
-
-

2. In the Primary Details panel, you can view the order number, order status, display status, order date, total amount, and the channel through which the order is placed. Display status is the status of the order that the customer sees when viewing the order from the IBM® Sterling Multi-Channel Selling Solution.
 - To view the price breakdown of the order, click the Total Amount value hyperlink. The Order Pricing Summary pop-up window is displayed. You can view the details of the prices applied to the order, such as the order line prices, the line-level price adjustments, the order total, and the order-level price adjustments. To view the line-level price adjustments resulting from charges and discounts applied to an order line, click the corresponding Adjustments value hyperlink. The Line Charges and

Discounts pop-up window is displayed. To view the order-level price adjustments resulting from charges and discounts applied to the order, click the Order Adjustments value hyperlink. The Order Charges and Discounts pop-up window is displayed.

- If the order has any associated alerts, a hyperlink indicating the total number of open alerts is displayed. To view the alert details, click the hyperlink associated with the  icon. For more information about viewing alerts, see [Section 2.11, "Performing Alert and Queue Management Tasks"](#).
 - If the order or any of the order lines are on hold, the  icon is displayed. To view and resolve holds, click the  icon. For more information about resolving order holds, see [Section 2.3.6, "Removing Holds"](#). The provided service line is displayed as a service line.
3. In the Bill To Address panel, you can view the details of the customer's address.
 4. In the Ship To Address panel, you can view the address to where the order is sent. If the order has multiple ship to addresses, the message "There are multiple ship to addresses on this order" is displayed.
 5. In the Completed Order Lines panel, you can view the product and/or configured items and/or service order lines that are fulfilled.
 6. In the Incomplete Order Lines panel, you can view the product and/or configured items and/or service order lines that are not fulfilled. The  icon is displayed if a stop delivery request has been placed.

Note: Based on the rules configured, you can view the bundle component items. For more information about configuring the display of bundle items, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

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

Note: When you click the tracking number hyperlink in the Completed Order Lines panel and the Expected On ship date hyperlink in the Incomplete Order Lines panel, the Shipment Inquiry screen is displayed. For more information about tracking an item, see [Section 2.3.10, "Tracking an Item or Inquiring About a Shipment"](#).

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

Note: If an order with future availability contains an item whose level of service is not selected, the exact availability date will be displayed only after the order is scheduled. For the exact availability date, refer to the Fulfillment Summary screen.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

7. In the Important Notes panel, you can view any additional information entered for the order. For more information about viewing or adding notes to an order see, [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).

8. Right-click on the order line of an item to track the item or view the line summary. For more information about tracking an item, see [Section 2.3.10, "Tracking an Item or Inquiring About a Shipment"](#).

If an order is being modified by a user through a different channel, for example, IBM® Sterling Web, and the order contains unsaved changes, when this order is opened simultaneously by a Sterling Call Center or Sterling Store user to perform modifications, the latter user is prompted to either revert the changes made by the Sterling Web user, or close the order. If the order does not contain any unsaved changes, the Order Summary screen is displayed, and the Sterling Call Center and Sterling Store user is allowed to make the necessary changes.

Similarly, if a Sterling Call Center or Sterling Store user is modifying an order, and the order is simultaneously opened by a Sterling Web user for order modifications, a message is displayed in the Sterling Call Center and Sterling Store applications indicating that the order contains unsaved changes made through a different channel. The Sterling Call Center or Sterling Store user is automatically taken to the Order Summary screen and is prompted to either revert the unsaved changes made by the Sterling Web user, or close the Order Summary screen.

Viewing Order Summary for Incompatible Orders


The Order Summary screen for incompatible orders is displayed if the order is incompatible with the version of the Sterling Call Center and Sterling Store application being used. You cannot perform any of the modification tasks on the order except cancelling the order if the order is in a status that allows cancellation. A message is displayed on the screen indicating that the screen has been modified because it is not compatible with the version of the application being used.

On the Order Summary screen, you can view the Primary Details, Bill To Address, and ship to address pertaining to the order. Click the Cancel button to cancel the order. This displays the Cancel Order pop-up window, where you must specify the cancellation reason. When the order is cancelled, a note containing the reason for the cancellation is automatically added to the order.

2.1.4.1 Viewing the Order Line Summary

To view the order line summary or provided service line information, right-click the corresponding order line in the Order Summary screen,


and select View Line Summary. The Line Summary screen is displayed. The following information is displayed in this screen:

- Primary Details—This panel displays the line number, item identifiers, item description, service, status, display status, quantity, and the unit price of an item. The  icon is displayed if the order line is on hold. This panel also indicates if the item is an open box or a gift item or both. The other details displayed in the screen are:
 - If the fulfillment method is Delivery or Shipping, the ship node is displayed.
 - If the fulfillment method is Pick Up, the store is displayed. Clicking the store hyperlink displays the Store Details window. For more information about viewing store details, see [Section 2.1.4.2, "Viewing Store Details"](#).

Note: To display item aliases in the Line Summary screen, configure the Item Alias to Use for the Alternate Item ID rule. For more information about configuring the rules for alternate item identifiers, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

- If the Sterling Call Center and Sterling Store application is configured to display the URL of a product Web page pertaining to an item, the View Product Web Page hyperlink is displayed. Click the View Product Web Page hyperlink to view the Web site providing details of the item.
- The gift message is displayed if the user has included a message for the gift item.
- Ship To Address—You can view the ship to address for an order line in this panel.
- Components—You can view the bundle component details such as bundle component items, item's description, status, and the component quantity in this panel.

Note: The Components panel is displayed only when you are viewing the order line summary of bundle items.

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

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

2.1.4.2 Viewing Store Details

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

2.1.4.3 Viewing Prices of Bundle Items

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

The unit price of the bundle parent and its components are computed based on the pricing strategy that has been configured for the bundle item. The unit price is displayed as follows:

- If the bundle pricing strategy is configured such that the price of the bundle item is calculated based on both the bundle parent and its component items, the unit price of the bundle parent is displayed along with the sum of the unit price of the component items in the Parent panel.
- If the bundle pricing strategy is configured such that the price of the bundle item is calculated based only on the bundle parent, only the unit price of the bundle parent is displayed in the Parent panel. In this scenario, the unit price is displayed as "Included" and the line total of the component items are not displayed.

- If the bundle pricing strategy is configured such that the price of the bundle item is calculated based only on the bundle components, the unit price of the bundle parent is displayed in the Parent panel and the unit prices of the component items are displayed in the Components panel.

Note: You cannot override the price of a bundle item whose pricing strategy is calculated as follows:

- The pricing strategy is calculated based on both the bundle parent and its component items.
- The pricing strategy is calculated based only on the bundle components.

However, you can adjust the price of the bundle item using the Add/Modify Charges hyperlink if the pricing strategy is calculated based on both the bundle parent and its component items.


If the pricing strategy is calculated based only on the bundle components, you cannot adjust the price of the bundle item.

2.1.5 Performing an Advanced Return Order Search

Using additional options, you can make your return order search more precise and view more details of the return such as the return order number, original order number, customer ID.

To perform an advanced return search:

1. From Tasks > Search, select Advanced Return Search. The Return Search screen is displayed.



In the Return Order Search Criteria panel, enter the appropriate search criteria. Select an option from the Order By drop-down list based on which the records will be sorted. Select Ascending or Descending from the adjacent drop-down list and click Search. The search results are displayed in the Recent Return Order List panel. If you cannot find the pertinent order number, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

2. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed. Click the View History Records hyperlink to retrieve return orders from the history table. You can click the View Recent Records hyperlink to switch back to recent records. The total number of records displayed in a single page is based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.
3. Double-click the appropriate order number. The Return Order Summary screen is displayed. For more information about viewing the return order summary details, see [Section 2.1.5.1, "Viewing Return Order Summary"](#).

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

2.1.5.1 Viewing Return Order Summary

In the Return Order Summary screen, you can view the details of a return order such as the primary details of the return order, refund to address, return from address, details of the corresponding exchange order.

1. In the Primary Details panel, you can view the return order number, order status, return order date, total refund amount, channel through which the items will be returned. If the order or any of the order lines are on hold, the  icon is displayed. To view and resolve holds, click the  icon. For more information about resolving order holds, see [Section 2.3.6, "Removing Holds"](#). The provided service line is displayed as a service line.

2. In the Refund To panel, you can view the details of the customers address.
3. In the Return From panel, you can view the address from where the items are being returned.
4. In the Exchange Order Details panel, you can view the details of the exchange order such as the exchange order number, status, total exchange amount and the exchange type.
5. In the Order Lines panel, you can view the original order number, item ID, unit price, quantity, return method and status of each line.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.


To track the item, right-click on the item and select Track This Item. For more information about tracking an item, see [Section 2.3.10, "Tracking an Item or Inquiring About a Shipment"](#).

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

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

2.1.5.2 Viewing the Return Order Line Summary

To view the return order line summary or provided service line information, right-click the corresponding return order line in the Return Order Summary screen, and select View Line Summary. The Line Summary screen is displayed. The following information is displayed in this screen:


- Primary Details—This panel displays the line number, item identifiers, item description, service, status, display status, quantity, and the unit price of an item. The  icon is displayed if the order line is on hold. This panel also indicates if the item is an open box or a gift item or both. The other details displayed in the screen are:

- If the fulfillment method is Delivery or Shipping, the ship node is displayed.
- If the fulfillment method is Pick Up, the store is displayed. Clicking the store hyperlink displays the Store Details window.

Note: To display item aliases in the Line Summary screen, configure the Item Alias to Use for the Alternate Item ID rule. For more information about configuring the rules for alternate item identifiers, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

- If the Sterling Call Center and Sterling Store application is configured to display the URL of a product Web page pertaining to an item, the View Product Web Page hyperlink is displayed. Click the View Product Web Page hyperlink to view the Web site providing details of the item.
- The gift message is displayed if the user has included a message for the gift item.
- Ship To Address—You can view the ship to address for a return order line in this panel.
- Components—You can view the bundle component details such as bundle component items, item's description, status, and the component quantity in this panel.

Note: The Components panel is displayed only when you are viewing the return order line summary of bundle items.

- Pricing—You can view the extended price, taxes applied, and the line total. If the item has been price matched, or if the item price has been overridden, you can also view these details in this panel. This panel also displays charge breakup and tax breakup information, if applicable.
- Important Events—You can view cancelled, reshipped, or returned information, if any, for the order line. If there are no important events for the order line, the message "No important event occurred on this line" is displayed. The  icon is displayed if a stop delivery request has been placed.

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


2.1.6 Searching for an Opportunity

You can search and view the details of an opportunity, such as the opportunity status, the date on which the opportunity is expected to be closed, the notes added to the opportunity, and so on.

To search for an opportunity:

1. From Tasks > Search, select Opportunity Search. The Opportunity Search screen is displayed.
2. From the Enterprise drop-down list, select the enterprise for which the opportunity was created. This drop-down list displays all the enterprises that you have access to.

Note: The Enterprise drop-down list is displayed only if you have access to multiple enterprises.

3. Enter the appropriate search criteria and click Search. The search results are displayed in the Opportunity Results panel. If you cannot find the opportunity you are searching for, click the  icon to display the search criteria again. Enter a more restrictive search criteria for the selected task and click Search.
4. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If your search criteria results in displaying the records in a single page, or if you are viewing the last page, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.


5. Double-click the appropriate opportunity record. The Opportunity Details screen is displayed. For more information about viewing the opportunity details, see [Section 2.1.6.1, "Viewing the Opportunity Details"](#).

2.1.6.1 Viewing the Opportunity Details

You may sometimes want to view the details of an opportunity, such as the opportunity's status, owner, and so on. To view the details of an opportunity, you must first search for the corresponding opportunity. For more information about searching for an opportunity, see [Section 2.1.6, "Searching for an Opportunity"](#).

You can view the information pertaining to an opportunity using the Opportunity Details screen.

- In the Create Opportunity panel, you can view the opportunity name, date when the opportunity was created, date when the opportunity is expected to be closed, opportunity ID, opportunity status, probability of the opportunity's success (in %), opportunity value, source from which the lead for creating the opportunity originated, the user who is assigned as the owner of the opportunity, and the secondary user who is assigned as the co-owner of the opportunity.
- In the Customer panel, you can view the customer's details for whom the opportunity has been created.

- In the Quotes panel, you can view any existing quotes that have been created for the opportunity. If the quote is a primary quote, the  icon is displayed.
- In the Important Notes panel, you can view and add additional notes about the opportunity.


2.1.7 Searching for a Quote

You may sometimes want to view a quote's summary, such as the quote's status, the items added to the quote, and so on. For example, if a user presents a quote to a customer, and if the customer neither accepts nor rejects the quote for a considerable period of time, the user may want to know the quote's expiration date so that the user can follow it up with the customer.

To search for a quote:

1. Perform one of the following tasks to open the Quote Search screen:
 - In the Quick Access panel, if the Enterprise drop-down list is displayed, select the enterprise for which you want to perform a quote search. Enter the appropriate search criteria and click Find Quote.
 - If a single quote exists that matches the search criteria, the Quote Details screen is displayed.
 - If multiple quotes exist that match the search criteria, the Quote Search screen is displayed.
 - From Tasks > Search, select Quote Search. The Quote Search screen is displayed. From the Enterprise drop-down list, select the enterprise for which you want to perform a quote search.

Note: The Enterprise drop-down list is displayed only if you have access to multiple enterprises.

2. Enter the appropriate search criteria and click Search. The search results are displayed in the Quote Results panel. If you cannot find the quote you are searching for, click the  icon to display the search criteria again. Enter a more restrictive search criteria for the selected task and click Search.

3. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If your search criteria results in displaying the records in a single page, or if you are viewing the last page, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

4. Double-click the appropriate quote record. The Quote Summary screen for the selected quote is displayed. For more information about viewing the quote details, see [Section 2.1.7.1, "Viewing the Quote Details"](#).

2.1.7.1 Viewing the Quote Details

You may sometimes want to view the details of a quote, such as the quote's status, owner, quote expiration date, and so on. To view the details of a quote, you must first search for the corresponding quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

You can view the following information pertaining to a quote using the Quote Summary screen:

- In the Quote Details panel, you can view the quote name, the opportunity for which the quote is created, the opportunity ID, quote status, the user who is assigned as the owner of the quote, the secondary user who is assigned as the co-owner of the quote, date when the quote will expire, actual date when the quote is closed, and the date when pricing was calculated for the quote.

If the quote is a primary quote, the  icon is displayed.

- In the Pricing Summary panel, you can view the quote's subtotal, any price adjustments that have been applied to the quote, shipping charges applied to the quote, taxes applied to the quote, the quote's grand total, and profit margin (in %) that is earned from the quote if the quote is converted into an order, for example, a profit margin of 20% means a profit of \$20 for every \$100 earned from the quote.
- In the Terms panel, you can view the payment term to be used for the quote. The payment term is used to specify the time frame a customer is entitled to pay the due amount if the quote is converted into an order. You can also view the date on which the items in the quote have been requested for delivery, the carrier service that has to be used to deliver the items in the quote, and the level of service for the quote. The level of service determines how the order will be fulfilled if the quote is converted to an order. For example, you may choose to either have the items delivered using a normal carrier service or an express carrier service. Note that the shipping charges may differ based on the level of service you select.
- You can also view the items added to the quote along with the quantity, price of each item, price adjustments, and the line total.
- In the Important Notes panel, you can view and add additional notes about the quote.

2.2 Answering Frequent Queries

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

Customers may call you and ask:

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

2.2.1 Where is my shipment?

Customers may inquire about the status of their orders. For example, if a customer does not receive items that were ordered, they may call you to inquire about the shipment. For more information about inquiring about a shipment, see [Section 2.3.10, "Tracking an Item or Inquiring About a Shipment"](#).

2.2.2 Why was I charged?

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

To inquire about these details for an order, the you must search for the order. For more information about searching for an order, see [Section 2.1, "Performing Search Tasks"](#).

After you locate the applicable order by navigating to Tasks > Frequent Queries, select Why was I charged? The Payment Inquiry screen is displayed. You can view the order total, the pending charges, and the payment status of the order.

You can also view the following information:

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

Note: If the order is on a hold which prevents payment processing, then the charge details are not displayed.

2.2.3 Why wasn't I refunded?

Sometimes customers expect refunds for returned items. If they do not receive a refund, they may call to inquire about the refund. In such situations, you can view the refund details and inform the customer about the reason why they were not issued a refund for the returned items. For more information about inquiring about refunds for returned items, see [Section 2.7.6, "Inquiring About Returns and Exchanges"](#).

2.2.4 How much will I be refunded?

Customers may inquire about the refund amount for the returned items. You can view the refund details for the returned items and inform the customer about the amount that will be refunded for the returned items. For more information about refund inquiries see, [Section 2.7.6, "Inquiring About Returns and Exchanges"](#).

2.2.5 Have you received my returns?

Customers may inquire about whether or not you have received the items that they return. In such situations, you can determine the status of the returned items and inform the customer. For more information about return inquiries, see [Section 2.7.6, "Inquiring About Returns and Exchanges"](#).

2.2.6 Where are my exchange items?

Customers may inquire about the current status of the items shipped in exchange for returned items. In such situations, you can determine the items that are replacements and view the status of the exchange items. For more information about exchange inquiries, see [Section 2.7.6, "Inquiring About Returns and Exchanges"](#).

2.3 Performing Order Tasks

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

- [Creating an Order](#)
- [Adding Order Lines](#)
- [Increasing Order Line Quantity](#)
- [Viewing and Adding Notes to an Order](#)
- [Applying Hold](#)
- [Removing Holds](#)
- [Canceling an Order](#)
- [Viewing and Confirming the Payment Details](#)
- [Returning an Order](#)
- [Tracking an Item or Inquiring About a Shipment](#)
- [Adding or Modifying Charges](#)
- [Scheduling and Releasing an Order](#)
- [Viewing Procurement Orders](#)
- [Exempting an Order from Tax](#)
- [Copying a Draft Order](#)
- [Ordering Again](#)
- [E-mailing Order Information](#)
- [Transferring a Draft Order to IBM Sterling Web](#)
- [Launching the Application Console](#)

2.3.1 Creating an Order

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

A navigation bar is displayed at the bottom of all the screens in the Create Order task flow. This helps you to clearly understand the sequence of steps you have to perform to complete the entire task. The navigation bar also enables you to revisit the previous screens, move to the next screen, or close the Order Entry screen.

When performing any of the steps in the order creation task flow, you have the option of clicking the Close button to close the Order Entry screen before confirming the corresponding order. Before the Order Entry screen closes, the Confirm pop-up window is displayed. Following are the tasks that you can perform in the Confirm pop-up window:

- If there are any changes made to the order that have not been saved, perform one of the following actions:
 - Enter a name for the order and click Save Changes to save the name and any other changes made to the order.
 - Click Discard Changes to discard the changes made to the order.
 - Click Cancel to remain on the Order Entry screen.
 - Click Delete Draft Order to delete the order.
- If you have not made any changes to the order, perform one of the following actions:
 - Enter a name for the order and click Confirm to save the draft order name.
 - Click Cancel to remain on the Order Entry screen.
 - Click Delete Draft Order to delete the draft order.

To create an order:

1. From Navigator > Order, select Create Order or from Tasks > Order, select Create Order. The Select Enterprise pop-up window is displayed. Select the appropriate enterprise from the drop-down list.
2. Click Confirm. The Create Order: Customer Identification-Ship to Address screen is displayed.
3. Click Skip this Page if:
 - The customer intends to pick up the items at the store immediately.
 - You want to capture the customer information only after confirming the inventory availability.

Note: Based on how Sterling Call Center and Sterling Store is configured, you may be able to search for customers based on their type.

4. If you have launched this task in the context of a business customer:
 - To create a new contact, click the Add New Contact hyperlink. The Add Contact pop-up window is displayed. For more information about creating a new contact, see [Section 2.3.1.1, "Adding a New Contact"](#).
 - From the Select a Contact drop-down list, select the contact.

Note: If the customer or contact does not have default addresses or payment methods defined, the default addresses or payment methods for the closest customer in the customer hierarchy will be used.

- The Ship To Address, Bill To Address, and Sold To Address are displayed.
- To change any of the addresses, click the Change hyperlink. The Modify Address pop-up window is displayed. For more information about modifying an address, see [Section 2.3.2.3.2, "Modifying an Address"](#).
- To exempt the order from tax, perform the following actions in the Customer Options panel:
 - Select the Allow Tax Exemption check box.
 - In the Tax Exemption Code field, enter the Tax Exemption Code of the order.
 - From the Currency drop-down list, select the currency.

Note: The Currency drop-down list is displayed only when multiple currencies are defined for the customer.

5. If you have launched this task in the context of a consumer customer:

- The Bill To Address and Ship To Address are displayed.
 - If you want to change any of the addresses, click the Change hyperlink. The Modify Address pop-up window is displayed. For more information about modifying an address, see [Section 2.3.2.3.2, "Modifying an Address"](#).
6. If this task is not launched in the context of a customer: To search for a customer, in the Find Existing Customer panel, do any of the following:
 - Enter the daytime telephone information.
 - Enter the e-mail address of the customer.
 - Enter the last name and first name of the customer.
 - Enter the last name and first few numbers of the postal code of the customer.
 - Enter the first name and first few numbers of the postal code of the customer.
 7. Click Search.
 - If more than one customer is found as a result of your search, a list of customer information is displayed. Select the appropriate customer information from the list.
 - If customers are not found as a result of your search, the following message is displayed: "Your search found zero results".
 - If more than fifteen customers are found as a result of your search, the following message is displayed: "Your search resulted in more than 15 matches. Please refine your search criteria". In such situations, you need to enter more restrictive search information.
 8. In the Customer Ship To Address panel, you can modify the Primary Info, Street Address, and Contact Information of the customers, if applicable.
 9. If the Bill To Address of the customer is same as the Ship To Address, check the "Use As Bill To Address" box.
 - If you want to override address verification, check the Override Address Verification box.

- If you do not want to override address verification and the address verification fails, the message "This is not a valid Address" is displayed.

10. Click Next.

- If the status of the customer or contact is Inactive, an Invalid Customer or Contact pop-up window is displayed. The order cannot be created until the status of the customer or contact has been changed to Active.

You can change the status of a consumer customer in the Manage Contact Information screen, and you can change the status of a business customer in the Manage Customer Information screen.

Note: When the status of a parent business customer changes to Inactive or On Hold, the status of the business customer and business customer contacts also changes to Inactive or On Hold, as appropriate.

- If the Bill To Address is not the same as the Ship To Address, the Customer Bill To Address screen is displayed. Enter the appropriate Bill To Address information.

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

- If the order already contains items and if the customer is not entitled to any of these items, an error message is displayed.

Based on the configuration, you will see one of the following screens:


- Add Items screen, with panels for each order line.
- Large Order Item Entry screen, with a table which is designed to handle large number of items.

Note: The application can be configured to either display the Large Order Item Entry screen always, or when the number of order lines exceeds a preconfigured number, or not at all.

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

Note: If the order is an existing draft order, an error message is displayed if any of the items, or the quantity of any of the items in the order fails validation.

If the application is configured to display the Add Items screen:




11. To search for an item, in the Item column, click the  icon. The Advanced Item Search screen is displayed. You can add the item to the order in one of the following ways:
 - Scan the barcode of the item or the alternate item.
 - In Item ID, enter the identifier of the item or scan the alternate item identifier.
 - If you have already added an item to the order, click the item name hyperlink. The Item Details screen is displayed. For more information about viewing the item details, see [Section 2.1.3, "Searching for an Item"](#).
 - If the item's effective date has expired and the item has an associated item that has been configured to substitute it, a confirmation pop-up window is displayed. Click Yes to add the new item to the order.
 - If the item fails validation, the following error message is displayed:

"Some of the items have errors that must be corrected. Please correct the errors in order to proceed."



Click OK. The screen is refreshed, and a message is displayed in the Error panel below the order line, indicating why the order line failed validation. If the order line failed validation because it did not meet the minimum order quantity criteria or the maximum order quantity criteria, you can override the quantity by selecting the Override < *Minimum* or *Maximum* > order quantity validation for this item check box.

Note: You can search for products, services, or both on the Advanced Item Search Screen. When searching for services or both products and services, the results display both independent and non-independent services. Non-independent services cannot be added to an order from the Item Inquiry screens.

Note: If the bundle item that is configured as ship independent is added to an order, the Choose Store hyperlink is not displayed.

12. To delete a particular order line, click the  icon adjacent the corresponding order line. A confirmation pop-up window is displayed. Click Yes if you want to delete the order line. If the order line has related lines associated with it, the order line and the related lines associated with it are immediately deleted.
13. To add order line notes, click the  icon associated with the order line. For more information about adding order line notes, see [Section 2.3.4.1, "Adding Notes to an Order Line"](#).
14. You can add related product or service items to an order or you can replace the items in an order through a pop-up or a panel based on the configuration. For more information about adding related items or replacing items, see [Section 2.3.1.2, "Adding Related Items or Replacing Items"](#).
15. To view the components of a bundle item, click the View Components () button. The Bundle Components pop-up window is displayed. You can view the details of the item, such as Item ID, Description, and Kit Quantity of the bundle components. Click Close to close the

Bundle Components pop-up window. However, if the item is a configurable bundle item, perform the following tasks:


- If the item is a preconfigured bundle item, you do not have to manually configure the item. However, if you want to reconfigure the item, click the Reconfigure () button. The Product Configurator pop-up window is displayed where you can view the components of the preconfigured bundle item and reconfigure the item, if needed.
- If the item is not a preconfigured bundle item, click the Configurable Bundle () button to open the Product Configurator pop-up window and configure the item.

Note: If an item is reconfigured, the fulfillment type and pricing information defined for the item will not be available until the configuration is completed.

16. If you enter partial Item ID of a model item or a stylized item, the Style Items pop-up window is displayed. For more information about selecting an item's style, see [Section 2.3.1.3, "Selecting an Item's Style"](#). If you scan or enter the item ID of a stylized item, the stylized item is added to the order.
17. In the Quantity column, enter the required item quantity.
18. In the UOM column, select the UOM for the item from the drop-down list. If a UOM does not exist for an item or if only one UOM exists, this column is not editable.
19. In the Unit Price column, you can view the unit price and list price of the item. The prices shown are based on the Ordering UOM.

After you update the order, the unit price of the bundle item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.


For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).



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

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

Note: If an order with future availability contains an item whose level of service is not selected, the exact availability date will be displayed only after the order is scheduled. For the exact availability date, refer to the Fulfillment Summary screen.

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

- If you want the item to be shipped to the customer, choose Ship.
 - If you want the item to be delivered to the customer's doorstep, choose Delivery.
 - If the customer wants to pick up the item from the current store, choose Pick Up.
 - If the customer wants to pick up the item from an alternate store, click the Choose Stores hyperlink. The More Stores screen is displayed. Select the appropriate store from where you want to pick up the item. The selected store is displayed next to the Pick Up option. For more information about viewing inventory in other stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
 - If the order line has already been created for Pick Up from a store other than the one in which the order is created, and if you want to pick up the item from the same store, choose Pick Up from (Store Name).
 - If the order line is a service line, the information indicating whether or not you can perform the service for that line is displayed.
- 22.** In the Line Total column, you can view the order line total along with the charges and discounts, if any, applied to the order line.
- If you are adding a new item, the  icon is displayed, indicating that the order needs to be updated to view the line total. If there are any special charges or discounts applied to the item, you will not be able to view those charges or discounts until you update the order. For example, if there is a 50% discount on the unit price of the item, you will not be able to view the discount until you update the order.


- If you make changes to an item that has already been added to the order, the  icon is displayed next to the line total value, with the tooltip indicating that the order needs to be updated to view the line total.
 - The charges and discounts applied to the order line are displayed as hyperlinks. Click the charges value hyperlink to view the charges applied to the order line or click the discounts value hyperlink to view the discounts applied to the order line. If the order line has been modified so that the line total is not current, the order is updated and the Line Charges or Line Discounts pop-up window is displayed. You can view the charges or discounts applied to the order line. Click Close.
23. To add more lines to the order, click the Add More Lines hyperlink.
 24. To add new service lines, click the Add Independent Services hyperlink. The Item Search screen is displayed. Select the service you want to add. The service line is added and indicated by the  icon. For more information about performing an advanced item search, see [Section 2.1.3.4, "Performing an Advanced Item Search"](#)
 25. To add an open box item, click the Add Open Box Item hyperlink. For more information about open box items, see [Section 3.3.9, "Adding Open Box Items"](#).
 26. To view the price breakdown of the order, click the value of the Subtotal that is displayed as a hyperlink. The Order Pricing Summary pop-up window is displayed. You can view the details of the prices on the order, such as the order line prices, line-level price adjustments resulting from charges and discounts applied to the order lines, order total, order-level price adjustments, order-level shipping charges, and taxes on the order.
 - To view the charges and discounts applied to an order line, click the corresponding Adjustments value that is displayed as a hyperlink. The Line Charges and Discounts pop-up window is displayed. Click Close.
 - To view the charges and discounts applied to the order, click the Order Adjustments value that is displayed as a hyperlink. The Order Charges and Discounts pop-up window is displayed. Click Close.

27. To view the updated unit price and line total details, click the Update Order button. The screen is refreshed, order lines are sorted alphabetically based on the Item ID, and the updated unit prices, and the order line total are displayed.
28. Click Next. If the order contains an item that has been replaced by another item in the catalog, or if the quantity of any of the items is less than the minimum order quantity or more than the maximum order quantity configured for those items, the following error message is displayed:


"Some of the items have errors that must be corrected. Please correct the errors in order to proceed."




Click OK. The screen is refreshed, and a message is displayed in the Error panel below the order line, indicating why the order line failed validation. If it failed validation because it did not meet the minimum order quantity criteria or the maximum order quantity criteria, you can override the quantity by selecting the Override <Minimum or Maximum> order quantity validation for this item check box.

If the application is configured to display the Large Order Item Entry screen:

29. To search for an item, in the Item column, click the  icon. The Advanced Item Search screen is displayed. You can add the item to the order in one of the following ways:
 - Scan the barcode of the item or the alternate item.
 - In Item ID, enter the identifier of the item or scan the alternate item identifier.
 - If you have already added an item to the order, click the item name hyperlink. The Item Details screen is displayed. For more information about viewing the item details, see [Section 2.1.3, "Searching for an Item"](#).
 - If the item's effective date has expired and the item has an associated item that has been configured to substitute it, a confirmation pop-up window is displayed. Click Yes to add the new item to the order.
 - If the item fails validation, the following error message is displayed:

"Some of the items have errors that must be corrected. Please correct the errors in order to proceed."

Click OK. The screen is refreshed, the  icon is displayed next to the order line, and a message is displayed in the Selected Line Information panel, indicating why the order line failed validation. If it failed validation because it did not meet the minimum order quantity criteria or the maximum order quantity criteria, you can override the quantity by selecting the Override <Minimum or Maximum> order quantity validation for this item check box.

30. To delete a particular order line, click the  icon adjacent the corresponding order line. A confirmation pop-up window is displayed. Click Yes if you want to delete the order line. If the order line has related lines associated with it, the related lines are automatically selected for deletion along with the order line.
31. To add order line notes, click the  icon associated with the order line. For more information about adding order line notes, see [Section 2.3.4.1, "Adding Notes to an Order Line"](#).
32. Click the  icon to add related product or service items to the order or to replace the items in the order. For more information about adding related items or replacing items, see [Section 2.3.1.2, "Adding Related Items or Replacing Items"](#).
33. To view the components of a bundle item, click the View Components hyperlink. The Bundle Components pop-up window is displayed. You can view the details of the item, such as Item ID, Description, and Kit Quantity of the bundle components. Click Close to close the Bundle Components pop-up window. However, if the item is a configurable bundle item, perform the following tasks:
 - If the item is a preconfigured bundle item, you do not have to manually configure the item. However, if you want to reconfigure the item, click the Reconfigure hyperlink. The Product Configurator pop-up window is displayed where you can view the components of the preconfigured bundle item and reconfigure the item, if needed.
 - If the item is not a preconfigured bundle item, click the Configurable Bundle hyperlink to open the Product Configurator pop-up window and configure the item.

Note: If an item is reconfigured, the fulfillment type and pricing information defined for the item will not be available until the configuration is completed.

34. If you enter partial Item ID of a model item or a stylized item, the Style Items pop-up window is displayed. For more information about selecting an item's style, see [Section 2.3.1.3, "Selecting an Item's Style"](#). If you scan or enter the item ID of a stylized item, the stylized item is added to the order.
35. In the Quantity column, enter the required item quantity.
36. In the UOM column, select the UOM for the item from the drop-down list. If a UOM does not exist for an item or if only one UOM exists, this column is not editable.
37. In the Unit Price column, you can view the unit price of the item.

After you update the order, the unit price of the bundle item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

38. In the Fulfillment method, you can view the default fulfillment method for the item.
39. In the Line Total column, you can view the order line total along with the charges and discounts, if any, applied to the order line.
 - If you are adding a new item, the "Update Order To View Line Total" message is displayed, indicating that the order needs to be updated to view the line total.
 - The charges and discounts applied to the order line are displayed as hyperlinks. Click the charges value hyperlink to view the charges applied to the order line or click the discounts value hyperlink to view the discounts applied to the order line. If the order line has been modified so that the line total is not current,

the order is updated and the Line Charges or Line Discounts pop-up window is displayed. Click Close.

40. In the Selected Line Information panel, you can view or modify the details pertaining to the selected order line.

You can view the following details pertaining to the order line:

- Item information
- Fulfillment method and availability (only for product items)
- Unit Price
- Line Total

Note: The availability details are not displayed if the user interface is not configured to do so.

Following is the list of information that the corresponding availability date displays:

- Pick Up displays the earliest date on which you can pick up the product from a store.
- Ship displays the earliest date on which you can ship the item.
- Delivery displays the earliest date on which the product is available.

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

Note: If an order with future availability contains an item whose level of service is not selected, the exact availability date will be displayed only after the order is scheduled. For the exact availability date, refer to the Fulfillment Summary screen.

If the fulfillment method is available for the order line, the appropriate option is enabled. If the fulfillment method is not available for the order line, the message "Not Available" is displayed along with the ⚠ icon.


- Information indicating whether you can perform the service for the order line or not (only for service items)
- Price information

You can perform the following tasks on the order line that has been selected:

- Modify Fulfillment Method
 - Select Store
 - Override Price
 - Change or Select an item's style (only for stylized items)
 - Configure or Reconfigure Items (only for bundle items)
41. To modify the fulfillment method, select the appropriate option:
- To ship the item to the customer, select Ship.
 - To deliver the item to the customer's doorstep, select Delivery.
 - If the customer wants to pick up the item from the current store, select Pick Up.


42. To pick up the item from a store other than the current store, click the Choose Store hyperlink. The More Stores screen is displayed. Select the appropriate store from where you want to pick up the item. The selected store is displayed next to the Pick Up option. For more information about viewing inventory in other stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
43. To override the price of an item, click the Override Price hyperlink. The Override Price for Item screen is displayed. To override the item price:
 - a. In Overridden Price, enter the new price of the item.
 - b. From the Reasons for Override drop-down list, select the appropriate reason.
 - c. In the Notes panel, enter any additional information, if applicable.
 - d. Click Close.
44. If the item is a stylized item, you can change the item's style or select a style for the item:
 - To change the item's style, click the Change Style hyperlink. The Style Items pop-up window is displayed. For more information about changing an item's style, see [Section 2.3.1.3, "Selecting an Item's Style"](#).
 - To select a style for the item, click the Choose Style hyperlink. The Style Items pop-up window is displayed. For more information about selecting an item's style, see [Section 2.3.1.3, "Selecting an Item's Style"](#).
45. If the item is a bundle item, you can configure or reconfigure the item:
 - To configure the item, click the Configure hyperlink. For more information about configuring an item, see the *Sterling Multi-Channel Selling Solution Administration Guide*.
 - To reconfigure an item, click the Reconfigure hyperlink. For more information about configuring an item, see the *Sterling Multi-Channel Selling Solution Administration Guide*.
46. If the item has accessories, the Accessories panel is displayed where you can view details about the accessories. To add the accessories to

the order, click Add To Order. The Accessories panel is displayed only when the order line is selected.

47. To add an open box item, click the Add Open Box Item hyperlink. For more information about open box items, see [Section 3.3.9, "Adding Open Box Items"](#).
48. To add new service lines, click the Add Independent Services hyperlink. The Item Search screen is displayed. Select the service you want to add. The service line is added and indicated by the  icon. For more information about performing an advanced item search, see [Section 2.1.3.4, "Performing an Advanced Item Search"](#).
49. To view the price breakdown of the order, click the value of the Subtotal that is displayed as a hyperlink. If the line total is not current, the order is updated and the Order Pricing Summary pop-up window is displayed. You can view the details of the prices on the order, such as the order line prices, line-level price adjustments, order total, order-level price adjustments, order-level shipping charges, and taxes on the order.
 - To view the line-level price adjustments resulting from charges and discounts applied to the order line, click the corresponding Adjustments value that is displayed as a hyperlink. The Line Charges and Discounts pop-up window is displayed. Click Close.
 - To view the order-level price adjustments resulting from charges and discounts applied to the order, click the Order Adjustments value that is displayed as a hyperlink. The Order Charges and Discounts pop-up window is displayed. Click Close.
50. To view the updated unit price and line total details, click the Update Order button. The screen is refreshed, order lines are sorted alphabetically based on the item ID, updated unit prices, and order line total are displayed.
51. Click Next.

If the order contains an item that has been replaced by another item in the catalog, or if the quantity of any of the items is less than the minimum order quantity or more than the maximum order quantity configured for those items, the following error message is displayed:

"Some of the items have errors that must be corrected. Please correct the errors in order to proceed."

Click OK. The screen is refreshed, the  icon is displayed next to the order line, and a message is displayed in the Selected Line Information panel, indicating why the order line failed validation. If it failed validation because it did not meet the minimum order quantity criteria or the maximum order quantity criteria, you can override the quantity by selecting the Override < *Minimum* or *Maximum* > order quantity validation for this item check box.

52. The Create Order: Change Fulfillment Options screen is displayed. For more information about choosing a fulfillment method, selecting an appointment, and viewing payment information, see [Section 2.5.1, "Modifying Fulfillment Options"](#).
53. Click Next. The Fulfillment Summary screen is displayed. For more information about the fulfillment summary details, see [Section 2.5.2, "Fulfillment Summary"](#).

Note: The Fulfillment Summary screen is displayed only if the fulfillment method is either Shipping or Pick Up.

Note: If you have not captured the customer information, the Bill To Address screen is displayed for you to enter the billing details.

54. Click Next.
 - If order lines are being delivered on this order, the Service Appointment screen is displayed where you can create an appointment. For more information about creating an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If there are no order lines to be delivered, the Payment Confirmation screen is displayed. For more information about viewing and confirming payment details, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).
 - If you are not required to enter the payment information, the Order Confirmation screen is displayed.

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

Table 2–1 Order Confirmation Screen

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

For more information about configuring the payment options, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

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


Note: You can modify only the existing charges.

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

2.3.1.1 Adding a New Contact

You can add a new contact for a business customer.


To add a new contact:

1. In the Customer panel, click the Add New Contact hyperlink. The Add Contact pop-up window is displayed.
2. Provide the corresponding information in the following panels, and click Confirm:
 - In the Customer Account panel, enter the first name and last name, middle initial, e-mail address, job title, and department of the contact.
 - In the Customer Contact Information panel, enter the contact's evening phone number, evening fax number, day phone number, day fax number, and mobile phone number.
 - In the Personal Information panel, enter the appropriate dates. To select a date, click the  icon and then select the month, year and day.
 - In the Contact Spending Limit panel, select the currency and enter the spending limit for the contact. In addition, specify an approving user and a backup approver. An approving user can approve an order for a contact who has exceeded a spending limit. A backup approver can approve orders for the contact if the contact is unavailable.
 - In the Web User panel, create a web user by entering a login ID, and selecting the locale and status for the contact. When you include information in these fields, the contact is linked to this web user, and an e-mail containing the web user's password is sent to the customer. In addition, you can select the user roles that you want to assign to this web user. User roles determine what a user can access on the web channel.

2.3.1.2 Adding Related Items or Replacing Items

You can add related product or service items to an order or replace the items in an order through a pop-up or a panel.

To add related items to an order or replace the items in an order through a pop-up.

1. Click the  icon. The Related Items pop-up window is displayed. You can view details such as the item description, item ID, unit price, associated quantity and the availability dates for Shipping, Pick Up, and Delivery.

Note: If the Check Inventory Configuration rule is not selected for related items, the availability dates will not be displayed.


Note: If an order with future availability contains an item whose level of service is not selected, the exact availability date will be displayed only after the order is scheduled. For the exact availability date, refer to the Fulfillment Summary screen.

2. Select the check boxes next to the product or service items that you want to add to the order.

Note: If the status modification rules do not allow you to cancel the original item or any of its related items, the check boxes for the items that have been configured to replace the original item are disabled.

Note: If you select an item that has been configured to replace the original item, the check boxes for the other items are disabled.

3. Click Add to Order. If the item that you added has been configured to replace the original item, the new item replaces the original item and its related items.

The related item that you added is indicated by the  icon. The tooltip for the related item indicator displays the parent item description.

To add related product or service items to an order through a panel:

1. Place the cursor on the line for which related lines need to be added. The Related Items panel is displayed at the bottom of the screen. You can view details such as the item description, item ID, unit price, associated quantity, and the availability dates for Shipping, Pick Up, and Delivery.


Note: If the Check Inventory Configuration rule is not checked for related items, the availability dates will not be displayed.

Note: If an order with future availability contains an item whose level of service is not selected, the exact availability date will be displayed only after the order is scheduled. For the exact availability date, refer to the Fulfillment Summary screen.

2. Press the INSERT key to set focus to the related items panel. Press Insert if you want to set focus back to the parent item panel.

Note: If the status modification rules do not allow you to cancel the original item or any of its related items, you cannot select any of the items that have been configured to replace the original item.

3. Click Add to Order. If the item that you added has been configured to replace the original item, the new item replaces the original item and its related items.

The related item that you added is indicated by the  icon. The tooltip for the related item indicator displays the parent item description.

Note: The associated quantity of related items is always displayed for 1 quantity of the parent item.

2.3.1.3 Selecting an Item's Style

Perform the following steps to select an item's style. Note that the following steps are applicable only if the Sterling Call Center and Sterling Store applications are configured to perform real-time availability checks for all the child items.

1. To check availability of items, you need to select:

- Country or Region
- State
- Zipcode

If the postal code is entered, the fulfillment methods available for the items are enabled based on the Catalog Configuration and inventory availability.

If the postal code is not entered, then the possible fulfillment methods for the items are displayed based on the Catalog Configuration and not based on the inventory.

2. In the Fulfillment Options panel, select the fulfillment method.

Note: If the Sterling Call Center and Sterling Store applications have been configured to check the availability of child items in a cached inventory, the Fulfillment Options panel will not be displayed.

3. Select the appropriate attributes and click the Add to Order button to add the stylized item to the order.

2.3.2 Adding Order Lines

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

A navigation bar is displayed at the bottom of all screens in the Add Lines to Order task flow. This helps you to understand the sequence of steps you need to perform to complete the task. The navigation bar also helps you to revisit previous screens easily, if applicable.


Note: The user can configure the country or region drop-down menu to not appear on screen. For more information on how to configure the country or region display, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

Note: If the status modification rules do not allow you to add an item to the order, an error message is displayed. For example, if the status modification rules do not allow you to add an item to the order which is in the scheduled status, the message "A new item cannot be added to the order because the order has already been scheduled" is displayed.


Note: Based on the order age configured, you can add new order lines to an existing order. If the order creation date is greater than the configured days, an error message is displayed.

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


To add new product or service lines:


1. From Tasks > Order, select Add Lines To Order. The Add Multiple Lines: Add Items screen is displayed.
2. For new order lines, in Item, enter the identifier of the item or item description, or choose the  to select an item from the Item List. You can also click the Add More Lines hyperlink. For more information about performing an advanced item search, see [Section 2.1.3.4, "Performing an Advanced Item Search"](#).

If the item's effective date has expired and the item has an associated item that has been configured to substitute it, a confirmation pop-up window is displayed. Click Yes to add the new item to the order.

3. To view the price adjustments applied to an order line, perform the following tasks:
 - To view the charges applied to the order line, click the charges value hyperlink in the Line Total column. The Line Charges pop-up window is displayed.
 - To view the discounts applied to the order line, click the discounts value hyperlink in the Line Total column. The Line Discounts pop-up window is displayed.
4. To view the components of a bundle item, perform the following tasks:
 - In the Add Items screen, click the  icon.
 - In the Large Order Item Entry screen, click the View Components hyperlink.

Note: If the bundle item that is configured as ship independent is added to an order, the Choose Store hyperlink is not displayed.

5. For new service lines, click the Add Independent Services hyperlink. The Item Search screen is displayed. Select the service you want to add. The service line is added and indicated by the  icon. For more information about performing an advanced item search, see [Section 2.1.3.4, "Performing an Advanced Item Search"](#).

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

6. To view the updated unit price and line total details, click the Update Order button. The screen is refreshed, order lines are sorted alphabetically based on the item ID, and the updated unit prices and order line total are displayed.
7. Click Next.

If the item fails validation because it does not meet the minimum order quantity criteria or the maximum order quantity criteria, the following error message is displayed:

"Some of the items have errors that must be corrected. Please correct the errors in order to proceed."

Note: The error message is displayed only if the new item that is added to the order fails validation.

Click OK. The screen is refreshed and a message is displayed in the Error panel below the order line, indicating why the order line failed validation. You can override the quantity by selecting the Override < *Minimum* or *Maximum* > order quantity validation for this item check box.

8. The Add Multiple Line: Change Fulfillment Options screen is displayed. You can view a detailed description about the item, quantity, and the fulfillment method. For more information about modifying the fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#).

Note: When you add a bundle item to the order, the fulfillment method for the bundle components will default to the same fulfillment method as the parent bundle item.

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

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

9. Choose the appropriate fulfillment option from the Select Fulfillment Method panel.
 - If the fulfillment method is Ship, select the appropriate fulfillment option from the drop-down list.
 - If the fulfillment method is Delivery, select the address to which the product needs to be delivered from the drop-down list.
 - If the fulfillment method is Pick Up, select the country or region from the drop-down list and enter the postal code. Click the Choose Stores hyperlink.
 - If the order line is a service line, the Select Service Address panel is displayed.
 - Select an address and click the Modify Address hyperlink to modify the address and click Apply.
 - Click the New Address hyperlink to enter a new address and click Apply.

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

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

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

10. Click Next. The Add Multiple Lines: Fulfillment Summary screen is displayed where you can view and modify the configuration of the order and how it is being fulfilled. For more information about fulfillment summary details, see [Section 2.5.2, "Fulfillment Summary"](#).

Note: The Fulfillment Summary screen is displayed only if the fulfillment method is either Shipping or Pick Up.

11. Click Next.
 - If any order lines are being delivered and the newly added lines require a new appointment or an existing appointment needs to be retaken, the Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about viewing the service fulfillment summary, see [Section 2.5.6, "Service Fulfillment Summary"](#).

12. Click Next. The Change Payment Methods screen is displayed. For more information about modifying payment methods, see [Section 2.7.4, "Changing Payment Methods"](#). In the Notes panel, enter any additional information, if applicable. For more information about adding notes to an order, see [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).

2.3.2.1 Overriding Item Price

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

To override the price of an item:

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

Note: You can override the price of a bundle parent item only.

2.3.2.2 Viewing Inventory in Other Stores

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

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

Note: You can also view the bundle component items while viewing the inventory for a bundle parent item.

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

Note: If you are dealing with a single country or region, the country or region drop-down list does not display on the screen. For more information about configuring the country or region display, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

2.3.2.3 Adding or Modifying Addresses

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

2.3.2.3.1 Adding a New Address

Adding a new address is a common CSR task.

To add a new address:

1. From the appropriate screen, click the New Address hyperlink. The Add New Address pop-up window is displayed. You can view the Primary Info, Street Address, and the Contact Info panels.
2. If you have launched this task in the context of a customer, select an address from the Bill To Address drop-down list.
3. Enter the primary information, street address, or contact information appropriately. In the Display Address As field, enter a description for the address. This helps you to easily identify the address the

customer is referring to when you are performing various address-related tasks.

Note: The Display Address As field will be displayed only if you have launched this task in the context of a customer.

Note: Based on the configuration, the City and State names may be populated depending on the information provided in the Country or Region and Postal Code fields.

If the address is not valid, the message "This is not a valid address" is displayed.

4. If you want to override the address verification, check the Override Address Verification box.
5. If you want to add the address to the customer record, select the Add this address to the Customer's record box.
6. In the Change Order : Change Service Appointment screen, if you click Previous button, it will take you to the previous screen where you can modify the address.
7. Click Confirm.

2.3.2.3.2 Modifying an Address

Modifying an existing address is a common CSR task.

To modify an address:

1. From the appropriate screen, select the address you want to modify from the drop-down list and click the Modify Address hyperlink. The Modify Address pop-up window is displayed.

If there are multiple ship to address with the same information in the first line, the Choose Your Address screen is displayed. Select the appropriate address.

2. To modify an existing ship to address, click the Modify Address hyperlink in the appropriate Ship To Address panel. The Modify Address pop-up window is displayed.

3. Modify the primary information, street address, or contact information appropriately. In the Display Address As field, enter a description for the address. This helps you to easily identify the address the customer is referring to when you are performing various address-related tasks.

Note: The Display Address As field will be displayed only if you have launched this task in the context of a customer.

If the address is not valid, the message "This is not a valid address" is displayed.

4. If you want to override the address verification, check the Override Address Verification box.
5. Click Confirm.

2.3.3 Increasing Order Line Quantity

Sometimes a customer may want to increase the quantity of one or more items on an order that is already placed. In such situations, the user can increase the order line quantity as requested by the customer. The line quantity can be increased for orders that have single or multiple order lines. For more information about searching for an order, see [Section 2.1, "Performing Search Tasks"](#).

This task does not check for future availability and should be used to increase the quantity on the order when the user is sure that the additional quantity is available on the same date as the original ordered quantity. In other cases, the Add Lines To Order task can be used. For more information about adding multiple lines to an order, see [Section 2.3.2, "Adding Order Lines"](#).


To increase the quantity of an existing order line:

1. From Navigator > Order, select Increase Line Quantity. The Increase Line Quantity screen is displayed.
2. In the Increase Line Quantity panel, you can view information about the item such as item description, identifier of the item or the alternate item, unit price, status, ordered quantity of the item, additional item quantity, and available item quantity.

Note: If the status modification rules do not allow you to increase the order line quantity, the order line is disabled.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

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

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

- If the quantity of a service item is increased, the Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).

8. Click Next. The Confirm Payment screen is displayed where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).

Note: When you increase the line quantity of a bundle item, all the component quantity will be increased in the same ratio defined while configuring bundles.

Note: When an order line is a part of a work order that has been partially delivered, you cannot increase the order line quantity.

2.3.4 Viewing and Adding Notes to an Order

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

To view the notes pertaining to an order:

1. In the Order Summary screen, click the View/Add Notes hyperlink in the Important Notes panel. The Order Notes screen is displayed.

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

2. From the Filter By Note Type drop-down list, select a note type to view notes pertaining to a specific note type.
3. By default, the Lower Priority Notes check box is selected. Clear the Lower Priority Notes check box if you want to view only high-priority notes.
4. From the Filter by Contact Method drop-down list, select a contact method to view notes pertaining to a specific contact method. For

example, to view notes related to a customer's call, select Phone as the contact method.

5. In the Notes Created By field, the User check box is selected by default. Select the System check box to view the system-generated notes in addition to the manually entered notes.
6. In the Notes Created On field, select the Order Lines check box to view the notes pertaining to all the order lines. Select the Return check box to view order-level notes for the return orders created for a sales order.
7. By default, the notes are truncated and displayed.
 - Click the Expand All Notes hyperlink to expand all the notes displayed in the Order Notes screen.
 - Click the Expand hyperlink next to a truncated note to expand that note.

To add a note to an order:

1. From the Note Type drop-down list the Order Notes screen, select the appropriate note type, if applicable.
2. From the Contact Method drop-down list, select the appropriate contact method, if applicable.
3. Select the Mark Priority as High check box if the note is of high priority.
4. Select the For Internal Use Only check box to mark the note for internal viewing.
5. Enter Contact Details such as the e-mail address or the telephone number of the customer.
6. Select the appropriate emoticon (smiley) for an order note, if applicable.
7. Enter the text of the note in the space provided.
8. Click Add Note. The note is added and displayed in the Order Notes panel.

Note: You can add notes that are specific to the bundle component level if the bundle item is configured as ship independent.

Note: If the status modification rules do not allow you to add notes to the orders that are in the current status, the Notes panel and the Add Note button are disabled.


9. Click Close.


2.3.4.1 Adding Notes to an Order Line

Sterling Call Center and Sterling Store enables you to add notes to an order line.

To view notes and add notes to an order line:

1. In the Order Summary screen, right-click the appropriate order line and select Add Line Notes. The Order Line Notes screen is displayed, where you can view and add notes.
2. Select the Order Header check box to view the notes pertaining to the corresponding sales order.
3. Select the Return check box to view the notes pertaining to the return orders created for this order.

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

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

2.3.4.2 Adding Notes to a Return Order

Sterling Call Center and Sterling Store enables you to view notes and add notes to a return order.

To view notes and add notes to a return order:

1. In the Return Order Summary screen, click the View/Add Notes hyperlink in the Important Notes panel. The Order Notes screen is displayed, where you can view and add notes.
2. Select the Order Line check box to view the notes added to the order lines.

2.3.5 Applying Hold

After creating an order, you can place the order on hold. Holds are usually placed to prevent further modifications to a particular order. For example, you may want to place an order on a Fraud Check hold after creating the order. Only users who belong to a user group that has the necessary permissions can place an order on hold at both the order level and the order line level.

To place either an order or order line on hold:

1. From Tasks > Order, select Apply Hold. The Apply Hold screen is displayed.
2. To place an order on hold, select the Select the entire order to apply an hold option.

If the status modification rules do not allow you to place the entire order on hold, the Select the entire order to apply an hold option is disabled, and the message "Hold cannot be applied to the order in this status" is displayed, indicating that you cannot place the order on hold.

To place an order line on hold, select the Select specific lines to apply an hold option.

If the status modification rules do not allow you to place specific order lines on hold, the Select specific lines to apply an hold option is disabled, and the message "Hold cannot be applied to the order lines in this status" is displayed, indicating that you cannot place the order lines on hold. Additionally, all the order lines are disabled.

Note: If the status modification rules do not allow you to place either the entire order or specific order lines on hold, the message "Hold cannot be applied on this order" is displayed.

3. Select the appropriate hold type from the Hold Type drop-down list. For more information about defining holds, see the *Sterling Distributed Order Management: Configuration Guide*.

Note: To apply a particular hold, you must belong to a user group that has the necessary permission to manually apply the hold.

4. In the Notes panel, enter any additional information, if applicable.
5. Click Apply Hold.

Note: If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

2.3.6 Removing Holds


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

To remove a hold on an order or order line:

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

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

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

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

2.3.7 Canceling an Order

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

To cancel an order:


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

Note: You cannot select a cancellation reason which is enclosed between **. This signifies that the cancellation reason is incompatible with the version of the application being used.

- b. Choose the Select Specific Quantity For Cancellation option.
- c. Check the boxes of the items you want to cancel.

Note: If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

- d. In the Enter the Quantity to Cancel field, enter the quantity of the item you want to cancel.
- e. In the status field of the order line, the  icon is displayed if a stop delivery request is placed.

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

- 4. In the Notes panel, enter any additional information for an order, if applicable. For more information about adding notes, see [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).
- 5. Click Confirm. The Confirm Payment screen is displayed. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).

Note: You can only cancel a bundle parent item. When you cancel a bundle item, all the component quantity will be cancelled in the same ratio defined while configuring bundles.

Note: If the status modification rules do not allow you to cancel an order line, then the order line is disabled.

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

2.3.8 Viewing and Confirming the Payment Details

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

- In the Detail List of Adjustment panel, you can view the item information such as the identifier of the item or the alternate item, the item's description, adjusted quantity, adjusted amount, charge refund details, and applied coupon or promotion details.
- If a stop delivery request is placed, a confirmation message is displayed along with the details of the Item and the Requested Quantity for that stop delivery.
- If an order is created for an existing customer, you can view the payment methods that are available for that customer in the Payment Methods panel. (The default payment methods are already selected in the panel). To apply a different payment method, select the corresponding payment method from the available list or add a new payment method. For more information about adding new payment methods, see [Section 2.7.4.1, "Adding New Payment Methods"](#).
- For more information about changing payment methods, see [Section 2.7.4, "Changing Payment Methods"](#). For more information about managing payment methods, see [Section 2.8.7, "Managing Customer Payment Method"](#).

- The funds available on a gift card or a stored value card are displayed. The Charge Amount is defaulted to either the order total or the funds available on the gift card, whichever is less.
- If the payment method is Customer Account, the funds available on the Customer Account is displayed in the Funds field.
- In case of a credit card, enter the CVV number when real-time authorizations are required. If only one credit card is used, the charge amount is defaulted from the order total. If multiple credit cards are used, enter the charge amount for each of the credit cards.
- If the payment method type is Check or Refund Check, you cannot modify the check amount.
- If you want to add a coupon or promotion to the order, click Add Coupon. For more information about adding coupons and promotion codes, see [Section 2.7.3, "Adding a Coupon or Promotion Code"](#).
- If you want to add a new payment method, click Add Payment Method. For more information about adding new payment methods, see [Section 2.7.4.1, "Adding New Payment Methods"](#).
- If you want to add a new charge or modify an existing charge, click the Add/Modify Charges hyperlink. The Add/Modify Charges pop-up window is displayed. For more information about adding or modifying charges, see [Section 2.3.11.1, "Adding or Modifying Charges"](#).
- If you want to enter any additional information for the order, in the Notes panel, enter the appropriate notes. For more information about adding notes, see [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).
- Click the Previous button to revisit the previous screen.

After you view the details or add a new payment method, click Confirm. Payment methods will be authorized and saved on the order. If authorization fails on any of the payment methods, the corresponding payment method is displayed in red and an error message is displayed. You can either click the payment method and make the necessary changes or if you feel that the payment method incorrectly returned an error, for example, when the payment system is unreachable, you can override the error and continue by selecting the Override and Continue check box.

Note:

- If the payment method is Customer Account, and if the account limit is exceeded, a warning message is displayed, indicating that the funds available in the account are insufficient to fulfill the order, and that the order may be put on hold until sufficient funds are provided.
 - If the payment method type is Other, you cannot modify the Charge Amount. The Charge Amount is deducted from the Provide Method of Payment for Amount field.
 - If you want to clear the value in the Amount to Charge field, ensure you enter zero. Do not keep the field blank.
-

If you are viewing the payment details after creating a return, you will see the View/Change Charge Details hyperlink in the Return Order Totals panel and Exchange Order Totals panel. For more information about viewing charge details, see [Section 2.3.11, "Adding or Modifying Charges"](#).

Note: If an exchange order is opened from Sales Order flow:

- The exchange type of the exchange order and the return total are not considered for displaying the payment information.
 - If the return order associated with the exchange order is a draft order, the Confirm button in the Confirm Payment screen is disabled. A message is displayed, indicating that the exchange order cannot be confirmed because the return order associated with it is yet to be confirmed. You can also click the View Return Order hyperlink to open the return order and perform the appropriate action.
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2.3.9 Returning an Order

Customers may want to return or exchange ordered items. For a complete description of how to accomplish this, see [Section 2.10.1, "Creating a Return Order"](#).

2.3.10 Tracking an Item or Inquiring About a Shipment

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

To track an item:

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



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

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

2. Select the item for which you want to view the shipment status.
 - If the item is in the "Shipped" status:
 - You can view the date on which the item is shipped.
 - If the item is packed in a container, you can view the tracking number, if available.
 - If the item is packed in multiple containers, you can view the container details.
 - You can view the carrier and service information for the shipment.
 - If you want to reship a container, click the Reship Container hyperlink. The Reship Select Item screen is displayed.
For more information about reshipping, see [Section 2.5.9, "Reshipping an Item"](#).
 - If you want to view the shipment details, click the View Shipment hyperlink. The Shipment Details screen is displayed. For more information about viewing shipment details, see [Section 2.3.10.1, "Viewing Shipment Details"](#).
 - If you want to view the container activities, click the View Container Activities hyperlink. The Container Activities pop-up window is displayed.

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

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

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

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

3. Click Close.

2.3.10.1 Viewing Shipment Details

In the Shipment Details screen:

- You can view details about the shipment such as the shipment number, service, ship node, status, seller, and number of containers by clicking on the View Shipment link.
- If you want to reship the shipment, click the Reship Shipment hyperlink. The Reship Select Item screen is displayed. For more information about reshipping a shipment, see [Section 2.5.9, "Reshipping an Item"](#).

- In the Shipment Lines in this shipment panel, you can view details about the shipment lines such as the identifier of the item or the alternate item, item quantity, unit price, and order number. You can also view the tracking number, container number information, and ship to address.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

- If activities are specified for a container, the View Container Activities hyperlink is displayed. Click the hyperlink to display the Container Activities pop-up window. You can view details such as the activity code, time stamp, additional information pertaining to the activity, and the user who created the activity.

2.3.11 Adding or Modifying Charges

The Add/Modify Charges screen provides information about the price details of an order. To view the charge details, you must first search for the order. For more information about searching for an order, [Section 2.1.1, "Searching for an Order"](#).

- From Tasks > Order Tasks, select Add/Modify Charges. The Add/Modify Charges screen is displayed.

You can view details such as taxes, charges and discounts at the order level and at the line level.
- In the Overall Order Totals panel, you can view the line total, grand charges, grand taxes, grand discount and the grand total.
- In the Header Price Details panel, you can view the, header taxes, header charges, header discount and the header total.
- In the Charge Breakup panel, you can view the break up of the charges on the order. If you want to add or modify the charges, click the Add/Modify Charges hyperlink. The Add/Modify Charges pop-up

window is displayed. For more information about adding or modifying charges, see [Section 2.3.11.1, "Adding or Modifying Charges"](#).

Note: If the status modification rules do not allow you to add or modify charges for an order, the Add/Modify Charges hyperlink is disabled.

- In the Tax Breakup panel, you can view the break up of the taxes on the order.
- In the Line Summary Details panel, you can view details of the items such as the item ID and description, item quantity and unit price.
- In the Line Price Details panel, you can view the price, taxes, charges and discount details of the selected line.
- In the Charge Breakup panel, you can view the break up of the charges on the line. If you want to add or modify the charges, click the Add/Modify Charges hyperlink. The Add/Modify Charges pop-up window is displayed. For more information about adding or modifying charges, see [Section 2.3.11.1, "Adding or Modifying Charges"](#).
- In the Tax Breakup panel, you can view the break up of the taxes on the line.
- Click Close.

2.3.11.1 Adding or Modifying Charges

The Add/Modify Charges pop-up window provides information about the existing charges and also lets you modify an existing charge or add a new charge. However, you cannot modify the charges applied on an order if the charges are based on a pricing rule.

In the Modify Charges panel, you can view the charge category, charge name and the charge amount.

1. If you want to add a new charge, click the Add Charge hyperlink. Select the category from the Charge Category drop-down list. Select the name of the charge from the Charge Name drop-down list. In the Charge Amount column, enter the appropriate amount for the charge.
2. In the Notes panel, enter any additional information, if applicable. For more information about adding notes to an order, see [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).

3. Click Confirm.

Note:

- Charge Category and Charge Name columns cannot be modified, only Charge Amount column can be modified. The Charge Amount column is shown in a different color indicating that it is editable.
- If you want to remove a charge, you can set the charge amount to zero.
- Add/Modify Charges can be performed only if the user has permission.
- If payments are configured outside Sterling Call Center and Sterling Store, then the Payment screen will not be displayed. Instead, the Order Summary screen will be displayed when clicking the 'Next' button in the Charge Detail screen.

2.3.12 Scheduling and Releasing an Order

The Schedule and Release screen provides details of the status of each order line and also lets you schedule and release an order. You can schedule and release an order if you belong to a user group, which has permission to do so.

To schedule or release an order, you must first search for the order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).

- From Tasks > Order, select Schedule and Release Order. The Schedule and Release screen is displayed.

In the Order Lines by Status panel, you can view the item ID and description, unit price, fulfillment method, status of the order line, quantity in that status, ship node, expected date and comments if applicable.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its

components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

- Click Confirm. The screen is refreshed to reflect the new status and ship nodes for applicable order statuses.

Note: Order status records which cannot be scheduled and/or released are grayed out. If there are no order lines to be scheduled and/or released, the message displays "All the order lines are already scheduled and released" and also the Confirm button is disabled. In case there is a problem in scheduling the order, the scheduling failure reason is displayed in the comments column.

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

2.3.13 Viewing Procurement Orders

You can view the procurement orders for an order (purchase order/transfer order), if you belong to a user group which has permission to do so.

To view procurement orders for an order, you must first search for the order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).

- You can filter order lines based on filter criteria.
- From Tasks > Order, select View Procurement Orders. The View Procurement Orders screen is displayed. In the Procurement Orders panel, you can view the order number, document type, status, supplier and the order date.
- Double-click the appropriate order number. The Procurement Order Summary screen is displayed. For more information about viewing

procurement order summary details, see [Section 2.3.13.1, "Viewing Procurement Order Summary"](#).

Note: If there are no procurement orders for the order, the message "There are no procurement orders for this Order" is displayed.

2.3.13.1 Viewing Procurement Order Summary

To view the procurement order summary:

1. Do one of the following to open the Procurement Order Summary screen:
 - From the View Procurement Orders screen, right-click on an order and select View Details.
 - From the View Procurement Orders screen, click on the order number hyperlink of the order for which you want to view the order summary.
2. The Procurement Order Summary screen is displayed. On this screen you can view the following information:
 - In the Primary Details panel, you can view the order number, order status, order date, total amount, document type and supplier.
 - In the Bill To Address panel, you can view the details of the address of the organization against which the order is billed.
 - In the Ship To Address panel, you can view the details of the address to which the order is shipped to.

Note: If there are multiple ship to addresses, the message "There are multiple ship to addresses on this order" is displayed.

- In the Order Lines panel, you can view the product and/or service order lines that are fulfilled.

2.3.14 Exempting an Order from Tax

You can exempt an order from tax for a business customer only if you belong to a user group that has the necessary permissions.

To exempt an order from tax, you must first search for the order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).

To exempt an order from tax:

1. Navigate to Tasks > Order, and select Change Tax Options. The Change Tax Options screen is displayed.

Note: If the tax options cannot be changed for the order in the current status, the following warning message is displayed:

"Tax options cannot be changed for an order in this status."

2. In the Tax Codes panel, select the Allow Tax Exemption check box and enter the Tax Exemption Code of the order in the Tax Exemption Code field.
3. In the Overall Order Totals panel, you can view the breakdown of the order, such as the order sub-total, charges, discounts, taxes, and the order total.
4. Click Confirm.
 - If there is a change in the order total, the Confirm Payment screen is displayed. For more information about confirming payment details, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).
 - If there is no change in the order total, the Order Summary screen is displayed. For more information about viewing an order summary, see [Section 2.1.4, "Viewing Order Summary"](#).

2.3.15 Copying a Draft Order

When creating an order, a customer may decide to use an existing order to create new orders in the future, where applicable. For example, a customer may place two orders for the same items and may want the


orders to be delivered on different dates. In such a scenario, you can copy the existing draft order to create a new order that is similar in content.

Note: You can create an order from an existing draft order only if you belong to a user group that has the necessary permissions.

To copy a draft order, you must first search for the order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).

To copy a draft order, navigate to Tasks > Order, and select Copy Draft Order. A new Order Entry screen, in which the attributes of the original order are copied, is displayed. You can modify the appropriate details pertaining to the order, as requested by the customer, and continue with the order creation task flow. For more information about creating an order, see [Section 2.3.1, "Creating an Order"](#).

Note: When you copy a draft order, some information from the original order may not be copied to the new order such as the appointment dates.

Note: If any of the order lines that are copied to the new order contains items that the customer does not have entitlements to, the  icon is displayed next to that order line, indicating that the order line is no longer valid.

2.3.16 Ordering Again


After placing an order, a customer may decide to use that order to create new orders in the future, where applicable. For example, a customer may place an order for a particular list of items every month, with the list varying only slightly from month to month. In such a scenario, the customer can copy the existing order to create new orders that are similar in content.

Note: You can create an order from an existing confirmed order only if you belong to a user group that has the necessary permissions.

To reorder an order, you must first search for the order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).

To reorder an order, navigate to Tasks > Order, and select Order Again. A new Order Entry screen, in which the attributes of the original order are copied, is displayed. You can modify the details pertaining to the order as requested by the customer, and continue with the order creation task flow. For more information about creating an order, see [Section 2.3.1, "Creating an Order"](#).

Note: When you copy a confirmed order, based on the configuration, the order and order line attributes are copied from the original order to the new order.

Note: If any of the order lines that are copied to the new order contains items that the customer does not have entitlements to, the  icon is displayed next to that order line, indicating that the order line is no longer valid.

2.3.17 E-mailing Order Information

If a customer wants to review the information pertaining to an order, you can send the information pertaining to the order through an e-mail.

Note: You can send the information pertaining to a draft order or a confirmed order to a customer only if you belong to a user group that has the necessary permissions.

To send the information pertaining to an order to a customer through e-mail, you must first search for the corresponding order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).

To send order information to a customer through e-mail:

1. From Tasks > Order, select Send Order E-mail. The Send Order E-mail pop-up window is displayed.
2. In the To field, if the e-mail address of the customer is not displayed by default, enter the corresponding e-mail address.
3. In the Cc field, enter an alternative e-mail address.

Note: You can also enter multiple e-mail addresses in the To and Cc fields. When entering multiple e-mail addresses, separate the e-mail addresses with a comma (,).

4. In the Introduction field, enter any additional information you want to send to the customer.
5. Click Confirm.

2.3.18 Transferring a Draft Order to IBM Sterling Web

Draft orders can be created either by a customer service representative through the Sterling Call Center and Sterling Store applications, or by a customer through the Sterling Web application. Draft orders created in Sterling Web are accessible through Sterling Call Center and Sterling Store. However, draft orders that are opened through Sterling Call Center and Sterling Store are not accessible through Sterling Web. In such situations, you may want to transfer the draft order from Sterling Call Center and Sterling Store to Sterling Web to enable customers to access the draft orders.

To transfer a draft order from Sterling Call Center and Sterling Store to Sterling Web, you must first search for the corresponding draft order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).

To transfer a draft order from Sterling Call Center and Sterling Store to Sterling Web:

1. Navigate to Tasks > Order, and select Transfer Order to Web. The Transfer Order to Web dialog box is displayed.

Note: Based on the configuration, the Transfer Order to Web task is displayed in the Related Tasks panel.

2. In the Draft Order Name field, enter an appropriate name for the draft order.
3. Click OK. A message is displayed, indicating whether the draft order was successfully transferred to Sterling Web.

Note: If the draft order is incompatible with the version of Sterling Web that is associated with Sterling Call Center and Sterling Store, a message is displayed, indicating that the draft order cannot be sent to Sterling Web because it is incompatible.

2.3.19 Launching the Application Console

You can use this task to launch the Application Console from within the Sterling Call Center and Sterling Store user interface. A CSR may sometimes need to launch the Application Console, for example, a CSR may want to adjust the inventory for an item. For example, call center and store representatives may need to access the detailed order audit screens available in the Application Console.

A user can launch the console only if the user belongs to a user group that has permissions to launch the console.

To launch the Application Console, from Tasks > Order Tasks, select Launch SMCFS Console. The Application Console is displayed.

- If the logged in user session times out, enter the user ID and password to login again.
- Click Close.

2.4 Performing Opportunity and Quote Tasks

This section explains how to perform the following opportunity and quote tasks:

- [Creating an Opportunity](#)
- [Modifying Opportunity Details](#)
- [Marking an Opportunity as Lost](#)
- [Creating a Quote](#)
- [Reworking a Quote](#)
- [Copying a Quote as a New Quote](#)
- [Copying a Quote as Alternative Quote](#)
- [Viewing Alternate Quotes](#)
- [Viewing or Modifying Problem Lines in a Quote](#)
- [Quote Approvals](#)
- [Presenting a Quote to a Customer](#)
- [Accepting a Quote on Behalf of a Customer](#)
- [Rejecting a Quote on Behalf of a Customer](#)
- [Generating a Proposal](#)
- [Converting Quote to Order](#)
- [Abandoning a Quote](#)

2.4.1 Creating an Opportunity

An opportunity is a container to hold a quote or related alternative quotes that can be presented to a customer. Related alternative quotes are a set of quotes that exist at the same time and are independent of each other, but are associated with the same opportunity. Irrespective of the number of quotes in an opportunity, only one can be accepted by a customer. For example, you may offer a customer three alternative quotes:

- Quote-A for two desktop computers, each being offered with 5% off the unit price.

- Quote-B for one desktop computer and one laptop, each being offered with 5% off the unit price.
- Quote-C for one desktop computer and two laptops, each being offered with 7% off the unit price.



The customer is offered to choose any one quote, Quote-A, Quote-B, or Quote-C.



You can create an opportunity for an existing customer or a new customer.

To create an opportunity:

1. From Tasks > Quotes/Opportunities, select Create Opportunity. The Select Enterprise dialog box is displayed.

Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.

2. From the Enterprise drop-down list, select the enterprise for which you want to create the opportunity. Click Confirm. The Create Opportunity screen is displayed.
3. Perform the following tasks in the Create Opportunity panel:
 - In the Opportunity Name field, enter a name for the opportunity.
 - From the Lead Origin drop-down list, select the source from which the lead for creating the opportunity originated. For example, a lead can originate from a phone conversation, trade show, Web site, and so on.
 - In the Success % field, enter the probability of success (in %). The probability of success is used to indicate the opportunity's chances of being successful.
 - Click the  icon adjacent to the Owner ID field to search and assign a user as the owner of the opportunity. The Owner Search Criteria pop-up window is displayed. Enter the appropriate search criteria and click Search. A list of users is displayed in the User Search Results panel. Select a user and click Apply. The User ID of the selected user is populated in the Owner ID field.
 - Click the  icon adjacent to the Anticipated Close Date field to select a date by which the opportunity is expected to close.

- In the Opportunity Value field, enter the value of the opportunity. The opportunity value is the total amount that will be earned as revenue if a quote for the opportunity is accepted by the customer.
 - Click the  icon adjacent to the Co-Owner ID field to search and assign a user as the co-owner of the opportunity. A co-owner is the secondary owner of the opportunity. The Owner Search Criteria pop-up window is displayed. Enter the appropriate search criteria and click Search. A list of users is displayed in the User Search Results panel. Select a user and click Apply. The User ID of the selected user is populated in the Co-Owner ID field.
4. Perform the following tasks in the Find Existing Customer panel:
 - a. Select the appropriate Customer Type.
 - b. Enter the required information pertaining to the customer and click Search.
 - c. The search results are displayed in the Customer Search Results panel. If you cannot find the customer you are searching for, click the  icon to display the search criteria again. Enter a more restrictive search criteria for the selected task and click Search.
 - d. Select the appropriate customer that you need from the Customer Search Results panel. The details pertaining to that customer are displayed in the Customer panel.
 - e. If the customer does not exist, create a new Consumer customer or Business customer. To create a Consumer customer, click Create Consumer. For more information about creating a Consumer customer, see [Section 2.8.1, "Creating a Consumer Customer"](#).

To create a Business customer, click Create Business. For more information about creating a Business customer, see [Section 2.8.2, "Creating a Business Customer"](#).
 5. Click Confirm. The Opportunity Details screen containing the details of the newly created opportunity is displayed.

2.4.2 Modifying Opportunity Details

After an opportunity is created for a customer, you can modify the details of the opportunity. For example, if the opportunity is expected to be closed at a date later than the one you had earlier anticipated, you can change the opportunity's anticipated close date by selecting a new date.

To perform this task, you must first search for the opportunity. For more information about searching for an opportunity, see [Section 2.1.6, "Searching for an Opportunity"](#). Information pertaining to the opportunity can be modified from the Opportunity details screen.

To modify the opportunity details:

1. Modify the required information in the Create Opportunity panel.
2. In the Customer panel, click the Add New Contact hyperlink to create a new customer contact. The Add Contact pop-up window is displayed. For more information about creating a new contact, see [Section 2.3.1.1, "Adding a New Contact"](#).
3. To modify an existing opportunity address, click the Modify hyperlink on the corresponding Opportunity Address.
4. In the Quotes panel, if there are no quotes created for the opportunity, you can create a new Quote by clicking the New button. For more information about creating a new quote, see [Section 2.4.2.1, "Creating a New Quote for an Opportunity"](#).

If there are any existing quotes that are created for the opportunity, click the Copy As New button to copy an existing quote to create a new quote and opportunity. For more information about copying a quote to create a new quote and opportunity, see [Section 2.4.2.2, "Copying a Quote to Create a New Quote and New Opportunity"](#).

Click the Copy As Alternate button to copy an existing quote to create alternative quotes. For more information about copying an existing quote to create alternative quotes, see [Section 2.4.2.3, "Copying a Quote to Create Alternative Quotes"](#).

To mark a quote as a primary quote, select the quote and click the Mark As Primary button.

5. To view or add notes, click the View/Add Notes hyperlink in the Important Notes panel. The Opportunity Notes pop-up window is displayed where you can view or add notes to the opportunity.

6. Click Confirm.

2.4.2.1 Creating a New Quote for an Opportunity

After an opportunity is created, you can create a quote for the opportunity. You can then define the items, pricing adjustments, shipment details, and payment information for the quote. When a quote is created for an existing opportunity, the customer who is assigned to the opportunity is automatically assigned to the quote.

To perform this task, you must first search for the opportunity. For more information about searching for an opportunity, see [Section 2.1.6, "Searching for an Opportunity"](#). You can create a new quote for an opportunity using the Opportunity Details screen.

To create a new quote for an opportunity:

1. In the Quotes panel, click the New button. The New Quote dialog box is displayed.

Note: The New button is displayed only if there are no quotes associated with the opportunity

2. Enter a name for the quote in the New Quote dialog box and click Confirm. The Quote Entry Wizard is displayed using which you can add items, enter payment, shipping details, and so on.

2.4.2.2 Copying a Quote to Create a New Quote and New Opportunity

You can copy an existing quote to create a new quote and a new opportunity, for example, you may want to use an existing quote, which you had created for a customer, for a different customer. In such a scenario, you can copy the quote along with the product information, payment, and shipment details, and then define the customer information to create a new quote and opportunity for the new customer.

To perform this task, you must first search for the opportunity. For more information about searching for an opportunity, see [Section 2.1.6, "Searching for an Opportunity"](#). You can copy an existing quote and create a new quote and opportunity using the Opportunity Details screen.

In the Quotes panel, click the Copy As New button. The Quote Entry Wizard is displayed using which you can create a new quote.

Note: The Copy As New button is displayed only if there is at least one quote associated with the opportunity.

Note: The customer information from the existing quote will be defaulted to the customer search criteria when creating the new quote. However, you can still search for a different customer before creating the new quote and opportunity.

2.4.2.3 Copying a Quote to Create Alternative Quotes

You can create an alternative quote within an opportunity by copying an existing quote. Alternative quotes are quotes that exist simultaneously and are associated with a single opportunity. After copying a quote, you can modify the product information, shipment, and payment details for the new quote. For example, let us suppose that you have a quote, Quote-A, for two desktop computers on which you have offered a discount of 5%. To provide another option to your customer, you can create an alternative quote, Quote-B, for one desktop computer and one laptop, on which you offer a discount of 6%. You can create Quote-B by copying Quote-A and modifying the product information accordingly.

To perform this task, you must first search for the opportunity. For more information about searching for an opportunity, see [Section 2.1.6, "Searching for an Opportunity"](#). You can copy an existing quote and create alternative quotes using the Opportunity Details screen.

To copy an existing quote to create alternative quotes:

1. In the Quotes panel, click the Copy As Alternate button. The Copy As Alternate dialog box is displayed.

Note: The Copy As Alternate button is displayed only if there is at least one quote associated with the opportunity.

2. Enter a name for the alternate quote in the Copy As Alternate dialog box and click Confirm. The Quote Entry Wizard is displayed using which you can add items, enter payment, shipping details, and so on.

2.4.3 Marking an Opportunity as Lost

You can mark an opportunity as Lost if the opportunity no longer serves any purpose. For example, when an opportunity is still in the Inquiry status, a customer may have purchased the products from another seller. In such a scenario, you may want to mark the opportunity as Lost and provide reasons for losing the opportunity.

To perform this task, you must first search for the opportunity. For more information about searching for an opportunity, see [Section 2.1.6, "Searching for an Opportunity"](#). You can mark an opportunity as Lost using the Opportunity Details screen.

To mark an opportunity as Lost:

1. From Tasks > Quotes/Opportunities, select Mark as Lost. The Mark as Lost screen is displayed.
2. From the Loss Reason drop-down list, select a reason for losing the opportunity. The loss reason is used to determine the reason why the opportunity was Lost, for example, Project Cancelled, Project Delayed, Competitor Price, and so on.
3. To view or add notes, click the View/Add Notes hyperlink. The Opportunity Notes pop-up window is displayed where you can view or add notes to the opportunity.
4. Click Confirm. The Opportunity Details window is displayed with the opportunity status as Lost.

2.4.4 Creating a Quote

A quote is a commercial document that allows a prospective buyer to see a predetermined set of products and quantities at a predetermined price to be delivered on a specific date. A quote is always associated with an



opportunity. You can create a quote for an existing opportunity or create a quote which does not have an associated opportunity. If you create a quote which does not have an associated opportunity, the opportunity is automatically created when the quote is created.

You can create a quote for an existing customer or a new customer.

To create a quote:





1. From Tasks > Quotes/Opportunities, select Create Quote. The Select Enterprise dialog box is displayed.

Note: The Select Enterprise dialog box is displayed only if you have access to multiple enterprises.


2. From the Enterprise drop-down list, select the enterprise for which you want to create the opportunity. Click Confirm. The Quote Entry: Customer Selection screen is displayed.
3. Perform the following tasks in the Quote Entry: Customer Selection screen:
 - In the Create Quote panel, enter a name for the quote.
 - Click the  icon adjacent to the Expiration Date field to select an expiration date on which the quote. If the expiration date is not specified when creating the quote, the expiration date will be defaulted based on the configuration.
4. Perform the following tasks in the Find Existing Customer panel:
 - a. Select the appropriate Customer Type.
 - b. Enter the required information pertaining to the customer and click Search.
 - c. The search results are displayed in the Customer Search Results panel. If you cannot find the customer you are searching for, click the  icon to again display the search criteria. Enter a more restrictive search criteria for the selected task and click Search.
 - d. Select the appropriate customer from the Customer Search Results panel. The customer details are displayed in the Customer panel.


- e. If the customer does not exist, create a new Consumer customer or Business customer. To create a Consumer customer, click Create Consumer. For more information about creating a Consumer customer, see [Section 2.8.1, "Creating a Consumer Customer"](#).

To create a Business customer, click Create Business. For more information about creating a Business customer, see [Section 2.8.2, "Creating a Business Customer"](#).

- 5. Click Next. The Quote Entry: Add Items screen is displayed.
- 6. Perform the following tasks in the Quote Entry: Add Items screen:
 - a. You can add items to the quote by entering the complete item ID in the Add Item field or by clicking the  icon to search for a particular item. For more information about searching for an item, see [Section 2.1.3, "Searching for an Item"](#).
 - b. Click Update to refresh the Create Quote screen with the updated items.
 - c. You can toggle between the Quote Lines tab and the Recommended Lines tab to add an item as a quote line or as a recommended line.
 - d. To delete a particular quote line, click the  icon adjacent to the corresponding quote line. A confirmation pop-up window is displayed. Click Yes if you want to delete the quote line. If the quote line has related lines associated with it, the quote line and the related lines associated with it are deleted when you update the quote.
 - e. To add quote line notes, select the check box corresponding to a quote line and click the  icon. For more information about adding quote notes, see [Section 2.4.4.1, "Viewing and Adding Quote Notes"](#).
 - f. To add related items or service items to a quote, select the check box corresponding to the item and click the  icon. The Related Items pop-up window is displayed. Select the check box adjacent to the required related item and click Add To Quote.

If there are no related items configured for the item, a message is displayed indicating that the item does not have any relationships configured.



- g. To view the components of a bundle item, click the  icon. The Component Lines pop-up window is displayed. You can view the details of the item, such as Item ID, Description, Quantity, unit price, adjustments, and so on. You can also adjust the price of the component items of the bundle item.

Note: The  icon is displayed only if the item is a bundle item.

Note: The unit price of the bundle parent item and its components is displayed based on the bundle pricing strategy that has been configured for the item. The unit price is displayed as follows:

If the bundle pricing strategy has been configured such that the price of the bundle item is calculated based on the bundle parent, only the unit price of the bundle parent is displayed in the Parent panel. In this scenario, the unit price and the line total of the product lines are not displayed.

The Line Adjustments button is displayed only if a manual pricing rule has been added to the item line. For more information about adjusting prices for the quote lines, see [Section 2.4.4.2, "Adjusting Prices"](#).

- h. If the item is a configurable bundle item, perform the following tasks:
- If the item is a preconfigured bundle item, you do not have to manually configure the item. However, if you want to reconfigure the item, click the  icon. The Product Configurator is displayed where you can view the components of the preconfigured bundle item and reconfigure the item, if needed.
 - If the item is not a preconfigured bundle item, click the  icon to open the Product Configurator and configure the item.

Note: If you are still reconfiguring the item, the fulfillment type and pricing information defined for the item will not be available until the configuration is completed.


- i. If you enter a stylized item, the Style Items pop-up window is displayed. For more information about selecting an item's style, see [Section 2.3.1.3, "Selecting an Item's Style"](#).
 - j. To view the details of an item that is added to the quote, click the item description hyperlink. The Item Details screen for the selected item is displayed.
7. In the Quote Lines tab, to move an item to the Recommended Lines tab, select the check box of the corresponding item and click Make Recommended.

The selected item is automatically moved to the list of recommended items, and is no longer displayed in the list of items under the Quote Lines tab.


8. In the Recommended Lines tab, to move an item to the Quote Lines tab, select the check box of the corresponding item and click Move to Quote.

The selected item is automatically moved to the list of quote items, and is no longer displayed in the list of items under the Recommended Lines tab.

9. To add line-level adjustments to an item, select the check box of the corresponding item and click Add Line Adjustments. The Adjust Price pop-up window is displayed.

To modify the price adjustments added to the quote line, click the  icon on the corresponding quote line. The Adjust Price pop-up window is displayed.


For more information about adding or modifying quote line price adjustments, see [Section 2.4.4.2, "Adjusting Prices"](#).

10. To view the quote price for a different pricing date, click the  icon adjacent to the Pricing Date field and select the required date. The quote price for the selected date will be displayed when you update the quote. The pricing date of a quote is the date on which the quote is created.

11. To perform header-level adjustments for a quote, click the Adjust Price button. The Adjust Price pop-up window is displayed. For more information about adjusting the quote price, see [Section 2.4.4.2, "Adjusting Prices"](#).
12. To narrow down the list of quote items displayed in the Quote Lines tab or the Recommended Lines tab, click the Show Filter Criteria hyperlink in the Search Quote Lines panel.

In the Find Products Within Quote field, enter the item ID or the item description as the search criteria. You can also specify additional criteria such as:

- All Lines – Searches for all items that match the search criteria.
- Lines Pending Approval – Searches only for the items that match the search criteria and are pending approval.

13. Click Next. The Quote Entry: Notes And Terms screen is displayed.
14. Perform the following tasks in the Quote Entry: Notes And Terms screen:
 - a. From the Payment Term drop-down list, select the payment term to be applied to the quote. The payment term is used to specify the time frame a customer is entitled to for paying the amount due if the quote is converted to an order.
 - b. From the Carrier Service drop-down list, select the carrier service to be used for the quote. The carrier service is the transportation service provider that will be used to deliver the products in the quote if the quote is converted to an order.
 - c. From the Level of Service drop-down list, select the level of service to be used for the quote. The level of service determines the way in which the order will be fulfilled if the quote is converted to an order. Note that the shipping charges may differ based on the level of service you select.
 - d. Click the  icon adjacent to the Requested Delivery Date field to select the requested delivery date for the quote. The requested delivery date is the date on which the products in the quote have been requested for delivery.
 - e. In the Shipping Instructions text box, enter the appropriate shipping instructions.

- f. To view or add notes, click the View/Add Notes hyperlink in the Important Notes panel. The Quote Notes pop-up window is displayed where you can view or add notes to the quote. For more information about viewing or adding notes, see [Section 2.4.4.1, "Viewing and Adding Quote Notes"](#).

15. Click Confirm to create the Quote.

2.4.4.1 Viewing and Adding Quote Notes

You may sometimes want to enter additional notes to a quote, describing the various actions taken on that quote for future reference. The quote notes can be either entered manually or generated automatically by the system.

Perform the following steps to view the notes pertaining to the quote:

1. In the Quote Entry: Notes And Terms screen, click the View/Add Notes hyperlink. The Quote Notes pop-up window is displayed.
2. From the Filter by Note Type drop-down list, select a note type to view notes pertaining to a specific note type.
3. From the Filter by Contact Method drop-down list, select a contact method to view notes pertaining to a specific contact method. For example, to view notes related to a customer's call, select Phone as the contact method.
4. By default, the Lower Priority Notes check box is selected. Clear the Lower Priority Notes check box if you want to view only high-priority notes.
5. In the Notes Created By field, the User check box is selected by default. Select the System check box to view the system-generated notes in addition to the manually entered notes.
6. By default, the notes are truncated and displayed.
 - Click the Expand All Notes hyperlink to expand all the notes displayed in the Quote Notes screen.
 - Click the Expand hyperlink next to the truncated note to expand the note.

Perform the following steps to add a note to a quote:

1. From the Note Type drop-down list the Quote Notes screen, select the appropriate note type.
2. From the Contact Method drop-down list, select the appropriate contact method.
3. In the Contact Details text box, enter contact details such as e-mail address or telephone number of the customer.
4. Select the Mark Priority as High check box if the note is of a high priority.
5. Select the For Internal User Only check box to mark the note for internal viewing.
6. Enter the text of the note in the space provided.
7. Click Add Note. The note is added and displayed in the Quote Notes screen.

Note: You can add notes at the bundle component level if the bundle item is configured as ship independent.

Note: If the status modification rules do not allow you to add notes to the quotes that are in the current status, the Important Notes panel and the Add Note button are disabled.

8. Click Close.

2.4.4.2 Adjusting Prices

You may sometimes want to adjust the price of the items in a quote by specifying new pricing rules for the items. For example, you might want to offer a discount of 5% on all the items in the quote as part of a promotional offer.

When adjusting the price of items in a quote, you can view a customer's rating and the metrics used to calculate the rating. The rating can help you determine the adjustments to be made to the price of items in a quote.

You can also refer to Discount Advisor to decide on a suitable price for a line item in the quote. The Discount Advisor provides a graphical representation of the minimum, maximum, and average discounts provided for the item in the past.

Note: You can view Discount Advisor only for a single item line in a quote.

Note: When you adjust the price of multiple items in a quote, you can neither view nor remove any of the pricing rules that are applied to the items.

Perform the following steps to perform header-level or line-level adjustments for a quote:

1. To adjust the price of a quote (header-level), click the Adjust Price button in the Quote Entry: Add Items screen.

To adjust the prices of quote lines (line-level), select the check box of the corresponding quote line and click the Add Line Adjustments button.

The Adjust Price pop-up window is displayed.

Note: You can also adjust the prices of quote lines by clicking the Adjust Price button. The adjustments will be applied to the corresponding quote lines.

2. From the Adjustments drop-down list, select a pricing rule and click Add. The pricing rule is displayed. Enter the absolute adjustment or percentage adjustment to be applied under the Adjustment field of the corresponding pricing rule.

Note: You can add a pricing rule only once.

To view the details of a customer's rating, click the View Details hyperlink adjacent to the Customer Rating field. The Customer Rating pop-up window is displayed. You can view the details of the customer

based on which the rating is calculated, such as the customer's lifetime revenue, the customer's average lifetime revenue, the customer's revenue in the previous year, the customer's average lifetime revenue in the previous year, and so on.


Notes:

- The View Details hyperlink is displayed based on the configuration.
 - The View Details hyperlink is disabled if there is no information available to display the metrics.
-
-

To view the discounts that were applied to an item in the past, click the Discount Advisor button. The Discount Advisor pop-up window is displayed. You can perform the following tasks in the Discount Advisor pop-up window:

- Click the Industry tab to view the minimum, maximum, and average adjustments provided to the customers belonging to the same industry as that of the customer in context.
- Click the Category tab to view the minimum, maximum, and average adjustments provided to the items that belong to the same category as that of the selected item.

Note: If you select multiple item lines in the quote, the Discount Advisor button is disabled indicating that you can view the Discount Advisor only for a single item line and not multiple lines.

3. To delete a pricing rule, click the  icon adjacent to the pricing rule.
4. Click Confirm. The Quote Entry: Add Items screen is refreshed with the updated header-level or line-level price adjustments.

2.4.5 Reworking a Quote

After a quote is Created and before it is Accepted or Ordered, the quote can be modified or restored to its original status by reworking the quote. The quote rework task restores the quote to the Created status and

removes existing approvals on the quote. This enables users to modify the quote if it has been rejected internally or by a customer.

If the reworked quote requires approval, then it will be treated as if it has never had any approvals attached to it.

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to rework a quote:

1. From Tasks > Quotes/Opportunities, select Rework Quote. The Rework Quote screen is displayed.
2. The Quote Details panel displays information such as quote name, opportunity name, status, quote owner, quote expiration date, and so on.
3. To view or add notes, click the View/Add Notes hyperlink. The Quote Notes pop-up window is displayed where you can view or add notes to the quotes.
4. Click Confirm. The Quote Entry wizard is displayed using which you can rework the quote and modify its details.

2.4.6 Copying a Quote as a New Quote

You may sometimes want to copy a quote that is associated with an opportunity to create a new quote and opportunity. For example, a user may want to use the item information and payment details of an existing quote for a different quote and opportunity.

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to copy a quote as a new quote:

1. From Tasks > Quotes/Opportunities, select Copy as New Quote. The Quote Entry wizard is displayed using which you can create a new quote.

2.4.7 Copying a Quote as Alternative Quote

You may sometimes want to offer alternative quotes to a customer. For example, consider that a customer is interested in purchasing 10 computers. A user may create a quote for 10 desktop computers, offering a discount of 5% on the quote total. To provide the customer with another option to choose from, the user may create another quote for 5 desktop computers and 5 laptops, offering a discount of 7% on the quote total.

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to copy a quote as an alternative quote:

1. From Tasks > Quotes/Opportunities, select Copy as Alternative Quote. The Copy As Alternative Quote dialog box is displayed.
2. Enter a name for the alternative quote in the Copy As Alternative Quote dialog box and click Confirm. The Quote Entry wizard is displayed using which you can add items, enter payment terms, shipping details, and so on.

2.4.8 Viewing Alternate Quotes

Alternative quotes are quotes that are independent of each other, but are associated with a single opportunity. Alternative quotes are used to present different options to a customer. A customer can, however, accept only one option. For example, if a customer is looking at purchasing kitchen appliances, you can present the following quotes as alternatives:

- Quote1 – One microwave oven at 5% discount and one coffee maker at 10% discount
- Quote2 – One microwave oven at 10% discount, one dishwasher at 5% discount, and one sandwich toaster and one coffee maker at 5% discount each

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to view alternate quotes:

1. From Tasks > Quotes/Opportunities, select View Alternate Quotes. The Opportunity Details screen is displayed. For more information about opportunity details, see the [Section 2.1.6.1, "Viewing the Opportunity Details"](#).

2.4.9 Viewing or Modifying Problem Lines in a Quote

and if you request an approval for the quote, present the quote to a customer, or convert the quote to an order, you will be redirected to the View Problem Lines screen to enable you to fix the problem lines before proceeding further. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to view the problem lines in a quote:

1. From Tasks > Quotes/Opportunities, select View Problem Lines. The View Problem Lines screen is displayed.
2. In the Quote Details panel, you can view details such as quote name, opportunity name, status, quote owner, quote expiration date, and so on.
3. In the Quote Lines panel, you can view the list of items that have failed validation.
4. To view the details of each line item, click the corresponding item. The Line Problems panel is displayed.
5. To reopen the quote and modify it, double-click the item in the Quote Lines panel. The Quote Entry wizard is displayed using which you can perform modifications on the quote to resolve the quote line problems.
6. Click Close.

2.4.10 Quote Approvals

You can present a quote to a customer only if the quote is in the Approved status. Based on the configuration, the quote may or may not require to be approved.

- If the quote does not require any approval by the approvers as defined in an approval plan, Sterling Call Center and Sterling Store automatically changes the status of a quote to Approved.

- If the quote requires approval, the quote must be approved by the approvers as defined in an approval plan before presenting the quote to a customer.

An approval is required if one or more of the following conditions are met:

- Any of the products in a quote violates an approval rule. For example, if an approval rule has been configured such that the quote requires to be approved each time the expiration date of the quote is modified. In such a scenario, whenever you modify the expiration date of the quote, the quote must be approved by the approvers before you can present it to a customer.
- The price adjustments applied to a quote or any of the products in a quote under a manual pricing rule exceed the maximum discount limit configured for a rule. For example, if the maximum discount limit configured for a 32" LCD television under a manual pricing rule is 5%, and you offer a discount of 7% to a customer, the quote must be approved before presenting it to the customer.

Note: Ensure that you have performed all the necessary modifications to the quote before sending the quote for approval. After a quote is sent for approval, you cannot perform any modifications to the quote.

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to request an approval for a quote:

1. From Tasks > Next Tasks, select Request Approval. The Request Approval screen is displayed.

Note: If any item in the quote fails validation, the View Problem Lines screen is displayed with a message indicating that the quote has problems and must be resolved before placing a request for an approval.

The Quote Details panel displays information such as quote name, opportunity name, status, quote owner, quote expiration date, and so on.

2. To view or add notes, click the View/Add Notes hyperlink. The Quote Notes pop-up window is displayed where you can view or add notes to the quotes.
3. Click Confirm.

If the quote does not require approval, the status of the quote changes to Approved.

If the quote requires approval, the Approvals screen is displayed.

2.4.10.1 View Approvals

You can view the approval summary of a quote that is pending approval. The approval summary displays the list of violations that require your approval. Additionally, if a quote requires approval from multiple approvers, you can view the approval status against each approver. For example, if a quote requires approval from the Sales Lead and the Sales Manager, and the head of the Legal department, you can view the status of the approval against each of these users.

When viewing the approval summary of a quote, you can also view the customer's rating and the metrics based on which the rating has been calculated.

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to view the approval and approve or reject the quote:

1. From Tasks > Quotes/Opportunities, select View Approvals. The Approvals screen is displayed.

To view the details of a customer's rating, click the View Details hyperlink adjacent to the Customer Rating field. The Customer Rating pop-up window is displayed. You can view the details of the customer based on which the rating is calculated, such as the customer's lifetime revenue, the customer's average lifetime revenue, the customer's revenue in the previous year, the customer's average lifetime revenue in the previous year, and so on.

Notes:

- The View Details hyperlink is displayed based on the configuration.
- The View Details hyperlink is disabled if there is no information available to display the metrics.

In the Approval Trail panel, you can view the list of approvers who are involved in the approval process and the status of the approval for each approver. If you are an approver for the quote, the row containing your name and team is automatically selected.

In the Violations That Require Approval panel, you can view the list of header-level and line-level violations that have to be approved.

2. To view the details of a particular violation, click the *<violations>* hyperlink. The Violations That Require Approval pop-up window is displayed.

Here, *<violations>* refer to header-level or line-level violations.

You can view the following information in the Violations That Require Approval pop-up window:

- Rule Name and Rule Description of the violation.
 - Details of the lines that have violated the rule, such as the unit price of the items, the adjustments applied to the items, and so on in the Lines Violating Rule panel.
 - Line total, adjustments applied to the line, profit margin, and so on in the Line Totals panel.
3. Click Close to close the Violations That Require Approval pop-up window and return to the Approvals screen.

In the Pricing Summary panel, you can view details such as the quote's subtotal, pricing adjustments applied to the quote, shipping costs, taxes applied to the quote, the grand total of the quote, and the profit margin earned from the quote, if the quote is converted to an order.

4. To view or add notes, click the View/Add Notes hyperlink. The Quote Notes pop-up window is displayed where you can view or add notes to the quotes.

5. To approve a quote, click Approve. The Approvals screen is refreshed and the status of the quote changes to Approved.
6. To reject a quote, click Reject. The Reject Reason pop-up window is displayed. Enter appropriate notes to explain why you are rejecting the quote and click Close. The Approvals screen is refreshed and the status of the quote changes to Rejected.
7. Click Close.

2.4.10.2 Quotes Pending Approval

You can view all the quotes that are pending your approval if you are part of the approval process. To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to view the quotes that are pending your approval:

1. From Tasks > Quotes/Opportunities, select Quotes Pending My Approval. The Quotes Pending My Approval screen is displayed.

Note: If there are no quotes that are pending your approval, a message is displayed indicating that there are no quotes pending approval.

In the Quotes Pending My Approval panel, you can view details such as quote name, customer name, quote owner, quote status, and the quote expiration date.

You can double-click on a quote to display the Approvals screen of the selected quote.

2. Click Close.

2.4.11 Presenting a Quote to a Customer

After all the necessary approvals have been obtained for a quote, you can present the quote to the customer for whom the quote has been created so that the customer can provide feedback on the quote.

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to present a quote to a customer:

1. From Tasks > Quotes/Opportunities, select Present To Customer. The Present To Customer screen is displayed.
2. To view or add notes, click the View/Add Notes hyperlink. The Quote Notes pop-up window is displayed where you can view or add notes to the quotes.
3. Click Confirm. The status of the quote changes to Presented.

2.4.12 Accepting a Quote on Behalf of a Customer

You can accept a quote on behalf of a customer. For example, a customer may agree to all the conditions laid down in a quote, and may want the quote to be processed so that the customer can place an order for the items in the quote.

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to accept a quote on behalf of a customer:

1. From Tasks > Next Tasks, select Accept Quote. The Accept Quote screen is displayed.

The Quote Details panel displays information such as quote name, opportunity name, quote status, quote owner, quote expiration date, and so on.
2. To view or add notes, click the View/Add Notes hyperlink in the Add Notes to Quote panel. The Quote Notes pop-up window is displayed where you can view or add notes to the quotes.
3. Click Confirm. The status of the quote changes to Accepted.

2.4.13 Rejecting a Quote on Behalf of a Customer

After a quote has been presented to a customer, you can reject the quote on behalf of the customer. For example, if a customer wants to reject a

quote based on the quote price, you can reject the quote on the customer's behalf.

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to reject a quote on behalf of a customer:

1. From Tasks > Next Tasks, select Reject Quote. The Reject Quote screen is displayed.

The Quote Details panel displays information such as quote name, opportunity name, quote status, quote owner, quote expiration date, and so on.

2. To view or add notes, click the View/Add Notes hyperlink in the Add Notes to Quote panel. The Quote Notes pop-up window is displayed where you can view or add notes to the quotes.
3. Click Confirm. The status of the quote changes to Rejected.

After a quote is rejected, you must rework the quote if you want to work on the quote again. For example, you may want to modify the quote price in order to present a customer with a better price for the products in the quote.

2.4.14 Generating a Proposal

You may sometimes want to generate a proposal from a quote and send it to a customer. For example, you may want to print a proposal in the PDF format and e-mail it to the customer as an attachment.

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to generate a proposal:

1. From Tasks > Quotes/Opportunities, select Generate Proposal. The Generate Proposal screen is displayed.
2. From the Proposal Template drop-down list, select the template to be used to generate the proposal.
3. From the Proposal Format drop-down list, select the format in which you want to print the proposal.

4. In the Proposal Title text box, enter a title for the proposal.
5. In the Salutation text box, enter the salutation that you want to address the customer, for example, Mr., Mrs., Miss, and so on.
6. In the Opening Comments text box, enter a few words explaining the purpose of the proposal.
7. In the Closing Comments, enter the closing comments, for example, Thank You, Looking forward to hearing from you, and so on.
8. In the Complimentary Closing text box, enter the words you want to end the proposal with, for example Sincerely, Truly, and so on.
9. Select the Show minor lines in the quote check box to include the components of a bundle item in the proposal.
10. In the Include in Print panel, select the check boxes corresponding to the attributes that you want to include in the proposal.
11. Click Generate. The proposal is displayed in a browser window.

Based on the configuration, you can perform one of the following tasks:

- Print the proposal directly from a printer.
- View the proposal in the format as configured.
- Save the proposal to a specific location.

2.4.15 Converting Quote to Order

After a customer accepts a quote in its current form, a user might want to convert the quote to an order.

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Note: You can convert a quote to an order only after the quote is accepted by the customer.

Perform the following steps to convert a quote to an order:

1. From Tasks > Next Tasks, select Convert Quote to Order. The Confirm Quote: Payment Confirmation screen is displayed.

2. If an order is created for an existing customer, you can view the payment methods that are available for that customer in the Payment Methods panel. (The default payment methods are already selected in the panel). To apply a different payment method, select the corresponding payment method from the available list or add a new payment method. For more information about adding new payment methods, see [Section 2.7.4.1, "Adding New Payment Methods"](#).
3. The Pricing Summary panel displays information such as sub-total, price adjustments, shipping charges, taxes, and so on.
4. The Bill To Address panel displays the bill to address for the quote.
5. The Ship To Address panel displays the Ship To Address for the quote.
6. To view or add notes, click the View/Add Notes hyperlink in the Important Notes panel. The Quote Notes pop-up window is displayed where you can view or add notes to the quote.

The notes that are marked as high priority are displayed in the Important Notes panel.

7. Click Confirm.

Note: If the payment method on the quote does not have sufficient funds to fulfill the order, a warning message is displayed indicating that the payment method has insufficient funds, and the order is placed on hold until sufficient funds are provided.

2.4.16 Abandoning a Quote

If you feel that a quote no longer serves a purpose, you can abandon the quote. For example, due to oversight, if you create a quote, you can abandon the quote.

To perform this task, you must first search for the quote. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

Perform the following steps to abandon a quote:

1. From Tasks > Quotes/Opportunities, select Abandon Quote. The Abandon Quote screen is displayed.

2. The Quote Details panel displays information such as quote name, opportunity name, status, quote owner, expiration quote date, and so on.
3. From the Reason panel, select a reason code from the Reason Code drop down list.
4. To view or add notes, click the View/Add Notes hyperlink. The Quote Notes pop-up window is displayed where you can view or add notes to the quotes.
5. Click Confirm. The Quote Summary screen is displayed with the status of the quote changed to Abandoned.

2.5 Performing Fulfillment Tasks

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

- [Modifying Fulfillment Options](#)
- [Fulfillment Summary](#)
- [Delivery and Service Grouping](#)
- [Modifying Service Instructions](#)
- [Modifying Service Appointments](#)
- [Service Fulfillment Summary](#)
- [Managing Delivery Service Option](#)
- [Modifying Order Addresses](#)
- [Reshipping an Item](#)

2.5.1 Modifying Fulfillment Options

When a customer requests a change in the fulfillment options for an item, you can modify the fulfillment options as requested. For example, after the customer places an order for delivery, the customer may decide to pick the items up at a nearby store. In such situations, you can modify the fulfillment options as requested. This task is also used when a customer wants to modify the delivery address for an order line. To modify the fulfillment options, you must first search for the order. For

more information about searching for an order, see [Section 2.1, "Performing Search Tasks"](#).

To modify the fulfillment options:

1. From Tasks > Fulfillment, select Change Fulfillment Options. The Change Fulfillment Options screen is displayed.
2. Select the Perform Advanced Service Grouping check box to group the order lines into smaller groups to ensure that appointments will be available for the various services and click Next. For more information about adding order lines to a group, see [Section 2.5.3, "Delivery and Service Grouping"](#).

Note: The Perform Advanced Service Grouping check box is displayed in the Change Fulfillment Options screen only if delivery or service order lines or both exist and if you have permissions to perform the Delivery and Service Grouping task.

3. Check the boxes of the items for which you want to modify the fulfillment options.
 - If you want to modify the fulfillment options for all items on the order, check the Check All box.
 - You can view the expected date of fulfillment for the order line in the Expected Date column. The expected date for:
 - Pick Up—displays the earliest date on which the customer can pick up the item from a store.
 - Shipping—displays the earliest date on which the item will be shipped from the warehouse.
 - Delivery—displays the earliest date on which the item will be shipped from the warehouse.

The expected date of fulfillment does not display for the order line, if:


- The requested pick up date does not exist.

- The work order appointment is not created.

Note: When you change the fulfillment option for a parent bundle item which is configured as ship independent, the fulfillment method for the component lines is automatically selected for modification.

For a bundle parent item which is configured as ship together, only the parent bundle item is displayed.

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

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

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

4. Choose the appropriate fulfillment method.
5. When the customer wants to pick up items from the store, choose the "Pick Up" fulfillment method.
 - a. Select the country or region in which the store is located from the drop-down list.
 - b. Enter the postal code or city, and state.
 - c. Click Search. The More Stores screen is displayed. For more information about viewing inventory in other stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
 - d. Select the appropriate store and click Apply.

- e. Click Next. The Fulfillment Summary Screen is displayed. For more information about fulfillment summary details, see [Section 2.5.2, "Fulfillment Summary"](#).
6. When the customer wants the items to be shipped, follow these steps:
 - a. Choose the Ship fulfillment method. The ship to address must be entered.
 - Select an address and click the Modify Address hyperlink to modify the address and click Apply.
 - Click the New Address hyperlink to enter a new address and click Apply.

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

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

- b. From the Service drop-down list, select the appropriate carrier service that the customer requests for item delivery.
- c. Click Apply.
- d. If you skip the customer identification step when capturing the order, you must enter an address for all the order lines that are being shipped or delivered.
- e. Click Next.
 - The Fulfillment Summary screen is displayed where you can view and modify the complete configuration of an order and how it is being fulfilled. For more information about fulfillment summary, see [Section 2.5.2, "Fulfillment Summary"](#).

Note: The Fulfillment Summary screen is displayed only if the fulfillment method is either Ship or Pick Up.

- f. Click Next.

- If any order lines are being delivered and the newly added lines require a new appointment or an existing appointment needs to be retaken, the Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about viewing the service fulfillment summary, see [Section 2.5.6, "Service Fulfillment Summary"](#).
7. When the customer wants the items to be delivered to their doorstep, follows these steps:
- a. Choose the Delivery fulfillment method. The Deliver To address must be entered.
 - Select an address and click the Modify Address hyperlink to modify the address and click Apply.
 - Click the New Address hyperlink to enter a new address and click Apply.

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

Note: Based on the configuration, the Fulfillment option is displayed. For more information about displaying the Shipping and Delivery as a separate fulfillment option, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

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

- b. If you skipped the customer identification step when capturing the order, enter the address for all order lines that are being delivered.

- c. Click Next.
 - If any order lines are being delivered and the newly added lines require a new appointment or an existing appointment needs to be retaken, the Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about viewing the service fulfillment summary, see [Section 2.5.6, "Service Fulfillment Summary"](#).

Note: If the status modification rules do not allow you to change the fulfillment method of an item, then an error message "Order cannot be modified in the current status" is displayed and also the order line is displayed in red.

8. When the customer wants to change the address for the provided service line:
 - a. Select all service lines in the list. The Service Address panel is displayed.
 - Select an address and click the Modify Address hyperlink to modify the address and click Apply.
 - Click the New Address hyperlink to enter a new address and click Apply.

For more information about adding new addresses or modifying the existing address, see [Section 2.3.2.3, "Adding or Modifying Addresses"](#).
 - b. Click Next. The Fulfillment Summary Screen is displayed. For more information about the fulfillment summary details, see [Section 2.5.2, "Fulfillment Summary"](#).

2.5.2 Fulfillment Summary

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

Note: If the bundle parent item is configured as ship independent, the bundle component items are displayed below the bundle parent item.



Based on the configuration, you can view the fulfillment summary in one of the following screens:


- Basic Fulfillment Summary
- Advanced Fulfillment Summary

2.5.2.1 Basic Fulfillment Summary Screen

In the Basic Fulfillment Summary screen, you can view the fulfillment summary for the order lines that are grouped based on the ship to addresses.

In the Shipment Summary panel, you can view the fulfillment summary for the Shipping fulfillment method:

- The address to which the item is shipped is displayed in the header panel.
- The  icon indicates that the item is a gift item and can be picked up or shipped to the gift recipient. For more information about setting up gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- The  icon indicates that the item is an open box item. For more information about open box items, see [Section 3.3.9, "Adding Open Box Items"](#).
- The image of the item is displayed.
- In the Item column, the item description and the Item ID are displayed.

Note: Order lines added recently are identified by the  icon.

- In the Quantity column, the order line's quantity is displayed.
- In the Unit Price column, the unit price of the item is displayed.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

- In the Available column, the earliest date on which the product is available is displayed. If the item is unavailable, the column is highlighted in red.
- In the Level of Service column, the carrier service for the item is displayed. To change the carrier service, select a different carrier service from the drop-down list.

Note: If you change the carrier service, the expected delivery date is updated to reflect the change.

- In the Expected Date column, the expected delivery date of the item is displayed. The expected date for:
 - Pick Up—displays the earliest date on which the customer can pick up the item from a store.
 - Shipping—displays the earliest date on which the customer can expect to receive the item.
 - Delivery—displays the earliest date on which the customer can expect to receive the item.
- In the Action column, select one of the following options from the drop-down list:

- Change to Pick Up
- Change to Delivery
- Cancel

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

Note: When a parent bundle line is cancelled, all the component lines are automatically cancelled.


If you change the action from Shipping to Change to Pick Up, you will be taken back to the Change Fulfillment Options screen, with the system automatically selecting the check box against each of the modified order lines. For more information about fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#).


- Click the Gift Options button to modify the gift options for the selected items. Select the check box next to the item for which you want to add or clear gift information. For more information about gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).


Note: In the Shipment Summary panel, if you select an item that has related items, all the related items shipped along with the parent item are automatically selected.

- Click Next to view the Confirm Payment screen containing the payment details pertaining to the order. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).

In the Pick Up Summary panel, you can view the following information:

- The ship node is displayed in the header panel.
- The  icon indicates that the item is a gift item and can be picked up by the recipient. For more information about setting up gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).


- The  icon indicates that the item is an open box item. For more information about open box items, see [Section 3.3.9, "Adding Open Box Items"](#).
- The image of the item is displayed.
- In the Item column, the item description and the item ID are displayed.

Note: Order lines added recently are identified by the  icon.

- In the Quantity column, the item's quantity is displayed.
- In the Unit Price column, the unit price of the item is displayed.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

- In the Available column, the earliest date on which the product is available in the ship node is displayed.
- In the Preferred Date column, the date on which the customer prefers to pick up the item is displayed. Click the  icon to modify the preferred date for picking up the item. The calendar displays the dates from the initial product ship date. If the product ship date is blank, the calendar does not display any date.
- In the Action column, select one of the following options from the drop-down list:
 - Change to Shipping
 - Change to Delivery
 - Cancel

If you change the action from Pick Up to Change to Shipping, you will be taken back to the Change Fulfillment Options screen, with the system automatically selecting the check box against each of the modified order lines. For more information about modifying fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#).

- Click the Gift Options button to modify the gift options for the selected item. Select the check box next to the item for which you want to add or clear gift information. For more information about setting up gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- Click the Change Store Location button to select the store from which you want to pick up the items. Select the check box next to the item you want to pick up from an alternative store. For more information about alternative pick up locations or stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).

Note: In the Pick Up Summary panel, if you select an item that has related items, all the related items that are picked up along with the parent item are automatically selected.

- Click Next to view the Confirm Payment screen in which you can view the payment details pertaining to the order. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).

Note: When you click the Next button, reservations are created for all the unscheduled and unreserved lines and quantities. If some quantity of items is unavailable, and a reservation cannot be created entirely, you are taken back to the Basic Fulfillment Summary screen where the unavailable lines are highlighted.

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

2.5.2.2 Advanced Fulfillment Summary Screen

In the Advanced Fulfillment Summary screen, you can view the fulfillment summary for the order lines that have been grouped based on the shipping options, ship to addresses, and the delivery date.

In the Shipment Summary panel, you can view the fulfillment summary for the Shipping fulfillment method:



- Select the appropriate shipping option to be used for fulfilling the order lines:
 - Group into as few shipments as possible: Select this option to optimize the order fulfillment in such a way that the items are shipped in as few shipments as possible to reduce shipping costs.
 - Faster. Group items available within a specific period of time, could cause additional charges: Select this option to optimize the order fulfillment in such a way that the items that are available within a specific period of time are shipped together.


Note: This option is displayed based on the configuration.

- Fastest. Ship items as they become available, could cause additional charges: Select this option to optimize the order fulfillment in such a way that the items are shipped as and when they become available. This may result in higher shipping costs.

Note: If the status modification rules do not allow you to change the shipping option, the shipping options will not be displayed.

Note: After you select a shipping option, the screen is refreshed to reflect the updated information.


- In the Unavailable Lines panel, the details of the order lines for which inventory is not available are displayed.
- In the header panel, the address to which the items are shipped and the expected shipment date are displayed.
- The  icon indicates that the item is a gift item and can be picked up or shipped to the recipient. For more information about setting up gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- The  icon indicates that the item is an open box item. For more information about open box items, see [Section 3.3.9, "Adding Open Box Items"](#).
- The image of the item is displayed.
- In the Item column, the item description and the Item ID are displayed.

Note: Order lines added recently are identified by the  icon.


- In the Quantity column, the order line's quantity is displayed.
- In the Unit Price column, the unit price of the item is displayed.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

- In the Available column, the earliest date on which the item is available is displayed.
- In the # of Shipments column, the number of shipments the order line is included in is displayed.
 - Click the  icon to combine the shipments that the order line is included in as one shipment. If you click this icon, the entire quantity pertaining to that order line will be shipped at the same time. Therefore, even if there is some quantity of items for that order line that can be shipped earlier, the items will not be shipped until the entire quantity pertaining to that order line is available.

Note: When an order line is split into multiple shipments, if you select one shipment, all the shipments that the order line is included in will be selected.

- Click the  icon to split the order line into different shipments. If you click this icon, the items for the order line will be shipped as and when they become available. This may, however, result in higher shipping costs.

Click Save and Refresh to save the changes.

- In the Requested Date column, the requested delivery date of the item is displayed.
- In the Action column, select one of the following options from the drop-down list:
 - Change to Pick Up
 - Change to Delivery
 - Cancel


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

Note: When a parent bundle line is cancelled, all the component lines are automatically cancelled.

If you change the action from Shipping to Change to Pick Up, you will be taken back to the Change Fulfillment Options screen, with the system automatically selecting the check box against each of the modified order lines. For more information about fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#).

- If any order lines have already been released, you can view the details of those order lines. To view the released order lines, click the View In Progress/Processed Lines hyperlink. The In Progress/Processed Items pop-up window is displayed with the details of the order lines that have been released.
- Click the Gift Options button to modify the gift options for the selected items. Select the check box next to the item for which you want to add or clear gift information. For more information about gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- Click the Change Line Options button to change the level of service and the requested delivery date for an order line. The Order Line Options pop-up window is displayed.

To change the level of service and the requested delivery date:



- a. From the Level of Service drop-down list, select the carrier service for the order line.
- b. In the Requested Delivery Date field, either enter the requested delivery date or select a date. To select a date, click the  icon and select the month, year, and date.
- c. Click Apply.
- d. Click Save and Refresh.


Note: If the order line is being shipped in multiple shipments, the level of service and the requested delivery date for all the units pertaining to that order line are changed.

Note: In the Shipment Summary panel, if you select an item that has related items, all the related items shipped along with the parent item are automatically selected.

- Click Next. The Confirm Payment screen, where you can view the payment details for an order, is displayed. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).

In the Pick Up Summary panel, you can view the following information:

- The ship node is displayed in the header panel.
- The  icon indicates that the item is a gift item and can be picked up by the recipient. For more information about setting up gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- The  icon indicates that the item is an open box item. For more information about open box items, see [Section 3.3.9, "Adding Open Box Items"](#).
- The image of the item is displayed.
- In the Item column, the item description and the Item ID are displayed.


Note: Order lines added recently are identified by the  icon.

- In the Quantity column, the item's quantity is displayed.
- In the Unit Price column, the unit price of the item is displayed.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is

displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

- In the Available column, the earliest date on which the product is available in the ship node is displayed. If the items are unavailable, the column is displayed in red.
- In the Preferred Date column, the date on which the customer prefers to pick up the item is displayed. Click the  icon to modify the preferred date for picking up the item. The calendar displays the dates from the initial product ship date. If the product ship date is blank, the calendar does not display any date.
- In the Action column, select one of the following options from the drop-down list:
 - Change to Shipping
 - Change to Delivery
 - Cancel

If you change the action from Pick Up to Change to Shipping, you will be taken back to the Change Fulfillment Options screen, with the system automatically selecting the check box against each modified order line. For more information about modifying fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#)

- Click the Gift Options button to modify the gift options for the selected item. Select the check box next to the item for which you want to add or clear gift information. For more information about setting up gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- Click the Change Store Location button to select the store from which you want to pick up the items. Select the check box adjacent to the item you want to pick up from an alternative store. For more information about alternative pick up locations or stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).

Note: In the Pick Up Summary panel, if you select an item that has related items, all the related items that are being picked up along with the parent item are automatically selected.

- Click Next to display the Confirm Payment screen in which you can view the payment details pertaining to the order. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).

Note: When you click the Next button in the Advanced Fulfillment Summary screen, reservations are created for all the unscheduled and unreserved lines and quantities. If some quantity of items is unavailable and a reservation cannot be created entirely, you are taken back to the Advanced Fulfillment Summary screen where the unavailable lines are highlighted.

2.5.3 Delivery and Service Grouping

When a complex order pertaining to numerous products, provided services, and delivery services exists, the task of scheduling appointments for these orders in the appointment scheduling screens of the Sterling Call Center and Sterling Store application becomes difficult.

To ease this difficulty, the Delivery and Service Grouping screen can be used. This screen allows you to select products and services, and assign them to a group before selecting an appointment. You can create new groups, merge multiple groups, and add or remove lines from the existing groups.

The Delivery and Service Grouping screen provides a summary of all the work orders and appointments related to an order. All the work orders that have the same ship to address are grouped under a single Address panel. When the order lines are not assigned to any group, and the

Delivery and Service Grouping screen is accessed for the first time, all the order lines are automatically assigned to a default group.

Note: Cancelled work orders are not displayed in the Delivery and Service Grouping screen.

When you add a new order line to an order, either of the following takes place:

- The new order line is added to a new work order under a new Address panel.
- The new order line is added to an existing work order.

2.5.3.1 Creating a New Group

To create a new group:

1. Select the check boxes adjacent to the order lines that you want to include in a new group.
2. Select the Create New Group option from the Group Selection panel.
3. Click Apply.

2.5.3.2 Adding Order Lines to an Existing Group

To add order lines to a group:

1. Select the check boxes adjacent to the order lines that you want to include in an existing group.
2. Select the Add Line(s) to Group option from the Group Selection panel.
3. From the Group Number drop-down list, select the group number to which you want to assign the order lines.
4. Click Apply.

Note: Based on the rules configured, an item, say, Item A, in an order, supports the delivery fulfillment method only if another item, say, Item B, in the same order supports it. In such situations, you cannot create different groups for these two items. If you try to create different groups, an error is displayed indicating that some of the order lines (in this context, Item A) are not grouped with a valid delivery line.

2.5.4 Modifying Service Instructions

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

To modify the service instructions, from Tasks > Fulfillment, select View/Change Service Instructions. The View/Change Service Instructions screen is displayed. You can perform any one of the following action:

- Click the View/Change Instructions hyperlink of the appropriate appointment. The View/Change Instructions pop-up window is displayed. You can either enter new service instructions or modify the existing service instructions, and click Confirm.

Note: You can modify the service instructions for deliveries that are not complete.

- Click the Change Appointment hyperlink to change the service appointment. The Select An Appointment screen is displayed. For more information about changing service appointments, see [Section 2.5.5, "Modifying Service Appointments"](#).
- The Notes panel is displayed, if you reach the Service Fulfillment Summary screen by performing any one of the following task:
 - [Modifying Service Appointments](#)

- [Modifying Service Instructions](#)

You can add any additional information related to the service transaction. For more information about adding order notes, see [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).

- Click the Advanced Service Grouping button to group the service lines into different appointment groups. For more information about adding order lines to a group, see [Section 2.5.3, "Delivery and Service Grouping"](#).

Note: The Advanced Service Grouping button displays on the screen only if you have permission to perform advanced service grouping.

- Click the Previous button to revisit the previous screen.

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


2.5.5 Modifying Service Appointments

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

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

The appointments that exist for the order is displayed in the top panel.

- If you have already taken an appointment, the details about the appointment is displayed.

If there is a problem with the appointment taken, the  icon is displayed.

- If you have not taken an appointment, a "Not Taken" message is displayed.

- If you have skipped an appointment by clicking the "Take Appointment Later" hyperlink, a "Skipped" message is displayed.
1. In the Calendar, click the left or right arrow to select the appropriate month, and select the day on which you want to take an appointment. By default, the current month is displayed in the calendar.
 2. In the Slots panel, select the appropriate slot for the appointment.

The Sterling Call Center and Sterling Store application provides the ability to switch the calendar view for the selected appointment by clicking any one of the following hyperlinks:

- Switch to day-first view—This view displays the calendar to the left of the screen. When you select a day, the slots available for that day display to the right.
- Switch to slot-first view—This view displays the slots to the left of the screen. When you select a slot in the Slots panel, the days available for the selected slot display to the right.

Note: The default calendar view is displayed depending on the rules configured. For more information about configuring the service appointments calendar view, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

3. If you do not want to take an appointment for the current work order immediately, click the "Take Appointment Later" hyperlink. The process of taking the appointment will be skipped, and you can continue with the order confirmation process.

If you have already taken an appointment for this work order, a "Remove Appointment" hyperlink will be displayed instead of "Take Appointment Later".


When the order contains multiple work orders, you must perform step 3 for each work order if you want to skip the task of taking appointments for more than one work order.

Note: The "Take Appointment Later" hyperlink and the "Remove Appointment" hyperlink are displayed only if you have permission to omit the task of taking an appointment.

If one or more items in a work order are not available, the "Take Appointment Later" hyperlink will not be displayed, and the unavailable items will be highlighted in red color.

Note: Transfer or purchase orders that are created to meet inventory reservation will not be cancelled when an appointment is removed.

4. In the Service Instructions panel, you can either enter new service instructions or modify the existing service instructions for the selected appointment.
5. In the Order Lines panel, you can view all items included for the selected appointment.

In the Problem Line column, the  icon is displayed only if the newly added line cannot be fulfilled for the current appointment.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

In the Available Date column, the earliest date when the product is available is displayed. If items are unavailable, the column is displayed in red.

If you want to change the fulfillment option of a newly added line or or cancel an order line, click the Line Actions hyperlink. The Line Actions pop-up window is displayed. In the Action column, select any one of the following actions from the drop-down list:

- Change to Pick Up - If the item supports the pick up fulfillment method.
- Change to Shipping - If the item supports the shipping fulfillment method.
- Cancel - If the line allows the cancellation.

Note: The Store Stock column displays the values "Yes" or "No" to indicate whether the item is available in the store, or is being procured from some other store.


6. Click Confirm.
 - If you select Change to Pick Up or Change to Shipping action, the Change Fulfillment Options screen is displayed. The boxes of the items that you modified are automatically checked. For more information about modifying the fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#).
 - If you select the Cancel action, the item is cancelled.
7. Click the Previous button to revisit the previous screen.
8. If you want to group the service lines into different appointment groups, click the Advanced Service Grouping button. For more information about adding order lines to a group, see [Section 2.5.3, "Delivery and Service Grouping"](#).

Note: The Advanced Service Grouping button is displayed in the Change Fulfillment Options screen only if delivery or service order lines or both exist and if you have permissions to perform the Delivery and Service Grouping task.

9. Click the Manage Service Option hyperlink to view or add or modify the delivery service option. For more information about viewing or adding or modifying the delivery service option, see [Section 2.5.7, "Managing Delivery Service Option"](#).
10. Click Save Appointment. The inventory is reserved and the capacity is allocated for the appointment.

2.5.6 Service Fulfillment Summary

You can view the summary of all appointments related to an order. The appointments are grouped based on the address displayed in the header panel. In the Appointment panel, you can view the appointment number, the current appointment, if an appointment has been taken, and the service charges applicable for the service. You can perform any one of the following actions:

- Click the  icon to view the order lines included in the appointment.
- Click the Change Appointment hyperlink to modify the service appointment. For more information about modifying service appointments, see [Section 2.5.5, "Modifying Service Appointments"](#).

Note: If the status modification rules do not allow you to change service appointment, the Change Service Appointment hyperlink is disabled.

- Click the View/Change Instructions hyperlink to view or modify the service instructions. For more information about modifying the service instructions, see [Section 2.5.4, "Modifying Service Instructions"](#).

Note: If the status modification rules do not allow you to change service instructions, the View/Change Instructions hyperlink is disabled.

- Click the Advanced Service Grouping button to group the service lines into different appointment groups. For more information about adding order lines to a group, see [Section 2.5.3, "Delivery and Service Grouping"](#).

Note: The Advanced Service Grouping button displays on this screen only if you have the permission to perform advanced service grouping.

- Click the Gift Options hyperlink. The Mark/Clear item(s) as gift(s) screen is displayed.

- Choose Mark this line/these lines as gift(s) to mark the item as a gift item.
- Choose These item(s) are not gift(s) if you no longer want the item to display as a gift item.
- Click Apply.
- Click the Manage Service Option hyperlink to view or add or modify the delivery service option. For more information about viewing or adding or modifying the delivery service option, see [Section 2.5.7, "Managing Delivery Service Option"](#).

2.5.7 Managing Delivery Service Option

Sometimes a customer may request you to modify the delivery service options for an item, in such case you can modify the delivery service options as requested.

To modify the delivery service option, click the Manage Service Options hyperlink of the appropriate appointment in the Change Appointment screen or Delivery Fulfillment Summary screen. The Manage Service Options pop-up window is displayed. You can select the checkbox of the corresponding delivery service and modify it. Click Confirm.

You can also modify the quantity and unit price of an item by clicking the Override Price hyperlink. For more information about overriding item price, see [Section 2.3.2.1, "Overriding Item Price"](#).

Note: In the Delivery Fulfillment Summary screen, if an appointment is already taken and cannot be changed, you cannot modify the delivery service option.

2.5.8 Modifying Order Addresses

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

To modify the address for an order:

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

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

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

Note: If the status modification rules do not allow you to change the address in the current status, the Modify Address hyperlink is disabled.

4. If the customer does not want to change more addresses, click Next. If the items need to be delivered, the View/Change Service Instructions screen is displayed. For more information about modifying service instructions, see [Section 2.5.4, "Modifying Service Instructions"](#).

2.5.9 Reshipping an Item

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

To reship an item, you must track the item. For more information about tracking an item, see [Section 2.3.10, "Tracking an Item or Inquiring About a Shipment"](#).

To reship an item:

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

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

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

7. If you want to reship all available items, in the Available Options panel, select Reship Available Items.
8. If you want to reship all available items and need to issue a refund for items that are not available, choose Reship Available Items and Refund Unavailable Items.
9. If you need to issue a refund for all items, choose Create Refund for All Items.
10. In the Notes panel, you can view or add any additional information.
11. Click Previous to go to the previous screen. If you click the Previous button, it does not allow you to undo any previous action.
12. Click Next.

If the items need to be delivered, the Select An Appointment screen is displayed. You can modify the service appointment of the items. For more information about modifying service appointments, see [Section 2.5.5, "Modifying Service Appointments"](#).

13. The Confirm Payment screen is displayed. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).

2.6 Performing Price Match Tasks

This section explains how to perform the following price match related tasks:

- [Matching an Item's Price](#)
- [Searching for a Price Match](#)
- [Adding a New Price Match](#)
- [Searching for a Competitor](#)
- [Adding a New Competitor](#)

2.6.1 Matching an Item's Price

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

To perform a price match for an item:

1. From Tasks > Price Match, select Price Match An Item. The Price Match: Select An Item screen is displayed.

Note: If the status modification rules do not allow you to change the price of an item, the order line is disabled.

2. Check the box of the item for which you want to match the price and click Next. The Price Match WorkSheet screen is displayed.


If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

3. Click the Previous button to revisit the previous screen.
4. In the previous screen, you can also select another item to price match.

Note:

- The order lines for which reshipping is applied are not available for price match.
 - The order lines that are cancelled are greyed out and are not available for price match.
 - The order lines that are in Partially Return Created status are not available for price match. However, an appeasement or an adhoc discount may be provided to appease the customer.
 - Bundle parent items are available for price match. However, if the price of a bundle item is not configured at the bundle parent, the bundle item will not be available for price match.
 - Bundle component items are not available for price match.
 - Delivery service lines are also not available for price match.
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5. Specify the Competitor name and minimum quantity to be price matched.
6. To specify the Competitor name, enter it in the text box or click  icon. The Competitor Search screen is displayed. For more information about searching for a competitor, see [Section 2.6.4, "Searching for a Competitor"](#). You can modify the minimum quantity to be price matched which is defaulted from the order line. Click Search.

Note: Content Assist is available while searching for a competitor. When you enter a few characters of the competitor's name, a list of competitors whose name begins with the characters entered is displayed.

Note: The minimum quantity entered should be less than or equal to the order line quantity.


7. If the competitor does not exist, the message "Competitor is not found in the database. Would you like to create a new Competitor?" is displayed. Click the Create Competitor button to create a new competitor. For more information about adding a new competitor, see [Section 2.6.5, "Adding a New Competitor"](#).
8. If the Competitor exists but has been previously DENIED for performing price matches, the message "This competitor cannot be used in a price match. If you entered incorrectly, close the message and search for a new competitor" will be displayed and the price match is rejected.
9. If the Competitor exists, in the Previously Attempted Price Matches panel, you can view the previously attempted price matches for this competitor and the Price Match Worksheet is displayed. If you click Next before entering the values in the Worksheet, the message "The price cannot be matched because the worksheet is incomplete. You may choose to go back and complete the worksheet or cancel the price match. Do you want to complete the worksheet?" is displayed. Click Yes to continue with the worksheet. Click No to close the worksheet.
10. Click the Select hyperlink to use a previously attempted price match. You can modify the price offered by the competitor, discounts and shipping charges offered by the competitor.
11. Discounts are defaulted in the Price Match Worksheet. The existing discount and charges are editable fields.

You can click Add/Modify Charges hyperlink which is present in the Price Match Worksheet to view the existing charges of the order displayed in the header and the line level.

12. The price match difference is displayed in the Refund Amount Per Unit From Price Match field. The Price Match Percentage defined for the competitor is also displayed when the percentage is anything other than 100%. Click Next.

Note: The Refund Amount Per Unit From Price Match is calculated by applying the price match percentage defined for the competitor.

- If the competitor's unit price and discounts is equal to a previously approved price match's unit price and discount, then the price match is approved. The Confirm Payment screen is displayed. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).
- If the competitor's unit price and discounts is greater than previously approved price match's unit price and discount, then the price match is approved. The Confirm Payment screen is displayed. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).
- If the competitor's net price is greater than the price offered by Sterling Call Center and Sterling Store, the message "We are offering a better price than the price match you have requested and the price match will not be applied. You may choose to go back to the worksheet and re-do your calculations or cancel the price match. Do you want to re-do your calculations?" is displayed. Click Yes to re-do the calculations on the Price Match Worksheet. Click No to close the Price Match Work Sheet.
- If the competitor's unit price and discount is equal to previously rejected price match's unit price and discount, the message "The Price Match record was previously rejected. We cannot match the requested price. If you think you have entered something incorrectly, please select Close and modify the information. If you select Confirm, it means that you can accept that this Price Match as rejected." is displayed. Click Close to modify the field values in the Price Match Work Sheet. Click Confirm to close the Price Match Work Sheet.


- If the competitor's unit price and discount is less than the previously rejected price match's unit price and discount, then the price match is rejected.
- If an existing price match which is in pending status is selected for price match:
 - If you do not have permissions to approve price match, the price match continues to be in pending status and can only be approved by a user who has permissions.
 - If you have permissions to approve price match, the Override Price match screen is displayed. Select the Approve Price Match option to approve the price match. Select the Do not allow this price match on future orders option, to not allow the price match on future orders. Select the Allow this price match on future orders till option to allow the price match until a particular date. To select a date, click the  icon and then select the month, year and day. Select the Deny Price Match option to reject the price match.
- If no existing price matches are found, pre-configured price match rules are used to check if the price match meets the No Hassle Criteria.
- If the price matches the No Hassle Criteria, a pop-up to enter notes to the price match is displayed. Click Confirm, the price match is approved and the Confirm Payment screen is displayed. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).
- If the price match does not satisfy the No Hassle Criteria:
 - If you do not have permissions to approve price match, an alert is created for the price match which can be approved/denied by a user who has permissions.
 - If you have permissions to approve price match, the Override Price match screen is displayed.

2.6.2 Searching for a Price Match

You may sometimes need to search for a price match record.

To search for a price match:

1. From Tasks > Price Match, select Price Match Search. The Price Match Search and List screen is displayed.
2. Select the enterprise from the drop-down list.
3. Enter the appropriate search criteria and click Search. The search results are displayed in the Price Match Results panel.

If you cannot find the pertinent price match, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

4. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." is displayed. You can select the Don't notify me again box, not to display the message again.

5. Double-click the appropriate price match. The price match details screen is displayed. For more information about viewing the price match details, see [Section 2.6.2.1, "Viewing Price Match Details"](#).
6. Click the Add button to add a new price match. For more information about adding a new price match, see [Section 2.6.3, "Adding a New Price Match"](#).

2.6.2.1 Viewing Price Match Details




In the Price Match Details screen, you can view the details of a price match such as competitor's name, enterprise code.

1. In the Price Match Details panel, you can view the enterprise code, item ID, UOM, expiration date of the price match, status of the price match, competitor, the minimum quantity to be price matched, competitor's unit price and competitor's discounts.
2. In the Price Match Description panel, you can view a brief description of the price match.
3. In the Order Lines Available panel, you can view the order lines on which the price match can be applied.
4. In the Order Lines Unavailable panel, you can view the order lines on which the price match cannot be applied.
5. Click Close.

2.6.3 Adding a New Price Match

Sterling Call Center and Sterling Store provides the ability to add a new price match, if the price match does not already exist.

To add a new price match:

1. From Tasks > Price Match, select Add Price Match. The Price Match Details screen is displayed.
2. Select the enterprise code from the drop-down list. Enter the item ID or click the  icon. The Advanced Add Item Search screen is displayed. Select the item from the list.
3. Enter the unit of measure for the item selected.
4. Select the expiration date for the price match. To select a date, click the  icon and then select the month, year and day.
5. Select the status for the price match from the drop-down list.
6. Enter the competitor or click the  icon to search for the competitor. Enter the minimum quantity to be price matched, the competitor's unit price and competitor's discounts.

If the competitor is in rejected status, then in such case the price match cannot be applied.

7. Click Confirm to add the price match.

Note: In the Price Match Notes panel of the Price Match Worksheet, notes entered for previously attempted price match are displayed.

2.6.3.1 Modifying a Price Match

Sterling Call Center and Sterling Store provides the ability to modify an existing price match. For example, you may want to extend the expiration date of a price match.

To modify an existing price match, you must first search for a price match. For more information about searching for a price match, see [Section 2.6.2, "Searching for a Price Match"](#).


1. In the Price Match Details panel, you can view the enterprise code, item ID, UOM, expiration date of the price match, status of the price match, competitor, the minimum quantity to be price matched, competitor's unit price, and competitor's discounts.
 - For an approved price match, you can only modify the expiration date.
 - For a pending or rejected price match, you can modify the expiration date, status of the price match, competitor's unit price and competitor's discounts.
2. In the Price Match Description panel, enter a brief description of the price match.
3. In the Order Lines For Which Price Can Be Matched panel, you can view the order lines on which the price match can be applied.
4. In the Order Lines For Which Price Cannot Be Matched panel, you can view the order lines on which the price match cannot be applied.

2.6.4 Searching for a Competitor

You may sometimes need to search for a competitor when performing a price match.

To search for a competitor:

1. From Tasks > Price Match, select Competitor Search. The Competitor Search and List screen is displayed.
2. Select the enterprise from the drop-down list.
3. Enter the appropriate search criteria and click Search. The search results display in the Competitor Results panel.

If you cannot find the pertinent competitor, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

4. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

5. Double-click the appropriate competitor. The Competitor details screen is displayed. For more information about viewing the Competitor details, see [Section 2.6.4.1, "Viewing Competitor Details"](#).

2.6.4.1 Viewing Competitor Details

In the Competitor Details screen, you can view the details of a competitor such as competitor's name, enterprise code.

1. In the Competitor Details panel, you can view the competitor's name, enterprise code, status of the enterprise, percentage of the price match, and the web address of the competitor.
2. In the Description panel, you can view a brief description of the competitor.
3. Click Close.

2.6.5 Adding a New Competitor

Sterling Call Center and Sterling Store provides the ability to add a competitor, if the competitor does not already exist.

1. Do one of the following to add a new competitor :
 - From Tasks > Price Match, select Competitor Search. The Competitor Search and List screen is displayed. Click the Add button, The Add Competitor screen is displayed.
 - From Tasks > Price Match, select Add Competitor. The Add Competitor screen is displayed.
2. In the Competitor Details panel, enter the competitor's name, enterprise code, status of the enterprise, percentage of the price match, and the web address of the competitor.
3. In the Description panel, enter a brief description of the competitor.
4. Click Confirm.

2.7 Performing Other Tasks on an Order

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

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

- [Reconfiguring Items](#)

2.7.1 Setting Up Gift Options

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

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



Note: If the status modification rules do not allow you to change gift options for an item, the message "Gift options could not be changed for the following Items" is displayed.

2.7.1.1 Gift Options for Pick Up

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

To set the gift options for pick up:

1. From Tasks > Other Tasks, select Change Gift Options. The Change Gift Options screen is displayed.
2. Select the check boxes next to the items you want to assign as gifts and click the Gift Options button. The Enter Gift Recipient Information pop-up window is displayed.

3. Select the Enter Gift Recipient Information option to enter the recipient's First Name, Last Name, and the Phone number.
4. To include a message with an item marked as a gift, enter the message in the Gift Message text box.
5. Select the Gift Wrap Item check box to gift wrap an item marked as gift. However, the Gift Wrap Item check box will be displayed only if both the following conditions are met:
 - The item that is to be gift wrapped must support gift wrapping. If the item does not support gift wrapping, a message is displayed, indicating that the item cannot be gift wrapped.
 - The store that ships the item must support gift wrapping services. If gift wrapping service is not supported by the corresponding store, a message is displayed, indicating that gift wrapping is not supported by the store.
6. Select the These item(s) are not gift(s) check box if you no longer want the item to be displayed as a gift item.
7. Click Apply.
 - The  icon is displayed against the corresponding gift item.
 - The  icon is displayed against the corresponding gift item which is to be gift wrapped.


2.7.1.2 Gift Options for Shipping


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

To set the gift options for shipping:

1. From Tasks > Other Tasks, select Change Gift Options. The Change Gift Options screen is displayed.
2. Select the check boxes next to the items you want to assign as gifts and click the Change Gift Options button. The Mark Shipping Lines As Gift pop-up window is displayed.
3. Select the Mark line(s) as gift(s) option to mark the item as a gift item.
4. To include a message with an item marked as a gift, enter the message in the Gift Message text box.

5. Select the Gift Wrap Item check box to gift wrap an item marked as gift. However, the Gift Wrap Item check box will be displayed only if both the following conditions are met:
 - The item that is to be gift wrapped must support gift wrapping. If the item does not support gift wrapping, a message is displayed, indicating that the item cannot be gift wrapped.
 - The store that ships the item must support gift wrapping services. If gift wrapping service is not supported by the corresponding store, a message is displayed, indicating that gift wrapping is not supported by the store.
6. Select the These item(s) are not gift(s) option if you no longer want the item to be displayed as a gift item.
7. Click Apply.

The  icon is displayed against the corresponding gift item.

The  icon is displayed against the corresponding gift item which is to be gift wrapped.



2.7.1.3 Gift Options for Delivery

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

1. From Tasks > Other Tasks, select Change Gift Options. The Delivery Fulfillment screen is displayed.
2. If the Sterling Call Center and Sterling Store application is configured to enable you to select the entire work order as a gift item, click the Change Gift Options hyperlink of the corresponding appointment. The Mark Delivery Line As Gift pop-up window is displayed.

If the Sterling Call Center and Sterling Store application is configured to enable you to select individual work order lines, select the check boxes next to the work order lines you want to assign as gifts and click the Change Gift Options button. The Mark Delivery Line As Gift pop-up window is displayed.

3. Select the Mark line(s) as gift(s) option to mark the work order as a gift item.
4. To include a message for an item marked as a gift, enter the message in the Gift Message text box.

5. Select the Gift Wrap Item check box to gift wrap an item marked as a gift. However, the Gift Wrap Item check box will be displayed only if both the following conditions are met:
 - The items in a work order that are to be gift wrapped must support gift wrapping. If any of the items do not support gift wrapping, a message is displayed, indicating that the item cannot be gift wrapped.
 - The store that ships the item must support gift wrapping services. If gift wrapping service is not supported by the corresponding store, a message is displayed, indicating that gift wrapping is not supported by the store.
6. Select the These item(s) are not gift(s) option if you no longer want the work order to be displayed as a gift item.
7. Click Apply.
 - The  icon is displayed against the corresponding gift item.
 - The  icon is displayed against the corresponding gift item which is to be gift wrapped.

2.7.2 Appeasing Customers

When a customer reports not being satisfied or has had a bad experience with any of the services that were provided, you can present them with an option to appease them. For example, a customer may report problems faced when placing an order online or report having received a damaged item. In such situations, you need to perform an appeasement task to make amends for the bad experience. To perform this task, you must first search for the order. For more information about how to search for an order, see [Section 2.1.1, "Searching for an Order"](#).

To appease a customer:

1. From Related Tasks > Other Tasks, select Customer Appeasement. The Customer Appeasement: Select Reasons for Customer Appeasement screen is displayed.

You can view the customer's rating and the metrics based on which the rating has been calculated. To view the details of a customer's rating, click the View Details hyperlink adjacent to the Customer Rating field. The Customer Rating pop-up window is displayed. You can view the details of the customer based on which the rating is

calculated, such as the customer's lifetime revenue, the customer's average lifetime revenue, the customer's revenue in the previous year, the customer's average lifetime revenue in the previous year, and so on.

Notes:

- The View Details hyperlink is displayed based on the configuration.
 - The View Details hyperlink is disabled if there is no information available to display the metrics.
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2. From the Reason For Appeasement drop-down list, select the applicable appeasement reason.
3. Select "Select All Available Items to Provide Appeasement", if the appeasement applies to all the available items of the order.
4. Select "Select Specific Items to Provide Appeasement", if the appeasement applies to some of the items of the order.

Check the boxes of the applicable items for which the appeasement applies.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

5. To view the customer credentials, such as the total revenue generated by the customer for the last twelve months, total lifetime revenue generated by the customer, and the average value of the customer's order accumulated over the lifetime of the customer, click the Display Customer Credentials hyperlink. The Customer Credentials pop-up window is displayed.

The customer's credentials are displayed as a bubble graph. Two bubbles are displayed. One bubble represents the customer and the other bubble represents the average customer. The x-coordinate in the bubble graph represents the total life time revenue generated by the customer. The y-coordinate represents the revenue generated by the customer for the last twelve months, and the z-coordinate (bubble size) represents the average value of the customer's order accumulated over the lifetime of the customer.

Note: The Display Customer Credentials hyperlink is displayed only if the order is created in the context of a customer, and if you belong to a user group that has the necessary permission to view the customer credentials.

6. To view any additional notes for the order, click the View/Add Notes hyperlink. For more information about viewing order notes, see [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).
7. In the Previous Appeasements panel, you can view appeasements that were previously applied to the order.

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

8. Click Next. The Customer Appeasement: Select Offer screen is displayed.

You can view the customer's rating and the metrics based on which the rating has been calculated. To view the details of a customer's rating, click the View Details hyperlink adjacent to the Customer Rating field.

The Display Customer Credentials hyperlink is displayed based on user permissions, and if the order is created in the context of a customer. Click this hyperlink to view the customer's credentials.

9. In the Appeasement Action panel, select the offer that is applicable for the appeasement. The preferred appeasement option is displayed in bold. Use your best judgement when deciding which option to apply to the order.

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

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

2.7.3 Adding a Coupon or Promotion Code

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

To add a coupon or promotion code:

1. From Tasks > Other Tasks, select Add a Coupon/Promotion Code. The Add Coupons: Entry screen is displayed.
2. In Add New Coupon/Promotion Code, enter the coupon or the promotion code.
3. Click Apply.
 - You can view details such as the line sub-total, total charges, total taxes, total discount, and grand total.
 - You can also view the type of coupon or promotion code added and the amount by which the order total is reduced.
 - If the coupon or promotion code cannot be added to the order, an appropriate message is displayed.

4. Click the Remove hyperlink to remove any coupon or promotion code that is already applied to an order.

Note: If the status modification rules do not allow you to add a coupon or promotion code to an order in the current status, the Add Coupon/Add promotion panel is disabled. If you do not have permissions to remove a coupon or promotion code, the Remove hyperlink is disabled.

5. Click Next. The Add Coupon: Confirm Payment screen is displayed. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).

2.7.4 Changing Payment Methods

A customer may need to change the mode of payment for an order. To change the payment method for an order, you need to first search for the order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#). Based on the configuration, either the Change Payment Methods screen or the enhanced Change Payment Methods screen will be displayed.

Change Payment Methods Screen

To change the payment method for an order:

1. From the Quick Access screen, navigate to Tasks > Other Tasks and select the Change Payment Method task. The Change Payment Methods screen is displayed.

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

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

- a. To edit a payment method, click the corresponding Payment Type hyperlink. The Modify Payment Method pop-up window is displayed. Make the necessary changes and click Apply.
- b. From the Action drop-down list, select the appropriate action needed for the payment method.

- To activate the current payment method for an order, select Activate.
 - To suspend the current payment method for any charges, select Suspended for Charges.
 - To suspend the current payment method for any charges and refunds, select Suspended for Charges and Refunds.
- c. If there is no maximum charge limit specified for the current payment method, from the Unlimited Charges drop-down list, select "YES".
 - d. If there is a maximum charge limit to be applied on the current payment method, from the Unlimited Charges drop-down list, select "NO". In the Maximum Charge Limit column, enter the maximum amount that can be collected against the current payment method.
 - e. Click the address hyperlink to edit the address corresponding to the payment method. The Modify Payment Method pop-up window is displayed. Make the necessary changes and click Apply. If it is too late to modify the address because the order is already being processed, the address cannot be edited.

If the customer wants to add a new payment method, click Add New Payment Method. The Add Payment Method screen is displayed. For more information about adding new payment methods, see [Section 2.7.4.1, "Adding New Payment Methods"](#).

2. Click Confirm.

Note: If it is too late to change the payment method because the order is already being processed, the Action drop-down list, Unlimited Charges drop-down list and the Max Charge Limit column in the Details panel and the Add Payment Method button are disabled.

Enhanced Change Payment Methods Screen

To change the payment method for an order:

1. From the Quick Access screen, navigate to Tasks > Other Tasks and select the Change Payment Method task. The enhanced Change Payment Methods screen is displayed. You can view the payment methods, order total, and bill to address pertaining to the corresponding order.

If an order is created in the context of a registered customer, you can view all the payment methods that have been saved against that customer, in the Payment Methods panel of the enhanced Change Payment Methods screen. Against each payment method, you can view the payment details, payment activity, maximum charge amount, and the transactions performed on the payment method, if applicable.

The Payment Details column displays information pertaining to the payment method, such as the type of payment method used, the amount charged on that payment method, and so on.

The Payment Activity column displays the authorized amount, amount charged or refunded against a particular payment method.

Perform the following tasks, as applicable:

- To modify the attributes of a payment method, click the Edit button. The Edit Payment Method pop-up window is displayed. Make the necessary changes and click the Apply button. The Adjust Charges pop-up window is then displayed with the charges adjusted on all the payment methods.
- To adjust the maximum charge amount for a payment method, click the Adjust Charges button. The Adjust Charges pop-up window is displayed with the charges defaulted on the payment methods, if applicable. You can view the pending amount, total amount, and payment methods. For each payment method, you can view the charged amount, as also the total amount to be charged for an order. Modify the charges and click the Apply button. Based on the changes made, the charges on the payment methods are adjusted accordingly.
- To remove a payment method that is yet to be processed, click the Remove button. If a payment method has already been processed, the Revoke button is displayed instead of the Remove button. You can click the Revoke button to suspend any further transactions to be performed on the payment method.

Note: If a payment method is revoked, click the Restore button to enable further transactions on the payment method.

- The Show Payment Transaction hyperlink is displayed if the payment method has already been processed. The Payment Transactions panel displays the date of the transaction, type of transaction, amount that is authorized, collected, or pending authorization, status of the transaction and error messages, if any, pertaining to the transaction.
2. If the customer wants to add a new payment method, click the Add Payment Method hyperlink in the enhanced Change Payment Methods screen. The Add Payment Method pop-up window is displayed. After a payment method is added, the Adjust Charges pop-up window is displayed with the charges adjusted on payment methods, if applicable. For more information about adding new payments, see [Section 2.7.4.1, "Adding New Payment Methods"](#).
 3. In the Notes panel, enter any additional information, if applicable.
 4. Click Confirm.

Note: If the total amount to be charged is not equal to or is less than the order total, an error message is displayed, indicating that there is a pending amount on the order.

2.7.4.1 Adding New Payment Methods

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

To add a new payment method:

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

- The Add New Payment Method pop-up window is displayed. Enter the information in the applicable fields as described in [Table 2–2](#) to [Table 2–8](#).

Table 2–2 Payment Type, Check

Field	Description
Check Account Number	Enter the check account number.
Check Amount	Enter the check amount.
Check Reference	Enter the check reference number.

Table 2–3 Payment Type, Credit Card

Field	Description
Credit Card Type	Select the type of credit card from the drop-down list.
Name on Card	Enter the name of the credit card holder as displayed on the card.
Credit Card #	Enter the credit card number.
Expiration Date	Enter the date through which the credit card is valid.
Credit Card Bill To Address	Enter the bill to address for the credit card.
Contact Info	Enter the contact information of the credit card holder.

Table 2–4 Payment Type, Customer Account

Field	Description
Customer Account #	Enter the customer's account number.

Table 2–5 Payment Type, Other

Field	Description
Payment Reference1	Enter the payment reference information, if applicable.
Payment Reference2	Enter the payment reference information, if applicable.
Payment Reference3	Enter the payment reference information, if applicable.
Maximum Charge Limit	Enter the maximum amount you can collect against this payment method.

Table 2–6 Payment Type, Pre-Paid

Field	Description
Transaction #	Enter the transaction number for the pre-paid payment type.
Register #	Enter the register number, if applicable.
Tender Type	Enter the tender type, if applicable.
Maximum Charge Limit	Enter the maximum amount you can collect against this payment method.

Table 2–7 Payment Type, Refund Check

Field	Description
Check Account Number	Enter the check account number.
Check Amount	Enter the check amount.
Check Reference	Enter the check reference number.

Table 2–8 Payment Type, Stored Value Card

Field	Description
SVC Card No	Enter the Stored Value Card number.
Payment Reference1	Enter the payment reference information, if applicable.
Payment Reference2	Enter the payment reference information, if applicable.
Payment Reference3	Enter the payment reference information, if applicable.

3. If you use a credit card for payment, select Use Bill To Address if you want to use the same Bill To Address as the original order, or select Use Another Address and modify the Bill To Address and contact information of the customer.
4. Click Apply.

When adding payment methods to an order, if a payment method is defined as CREDIT CARD or OTHER payment method, you can save the payment method against the order and the customer record. The Max Charge Limit on the Credit Card or Other Payment Method is saved only against the order and not against the customer record.

If a contact is defined on the order, the payment method is saved against the contact record. If a contact is not defined on the order, and if the Save Against Customer check box is selected, the payment method is saved against the customer record.

2.7.5 Viewing Payment Details

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

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

Note: You cannot view the payment details of the order, if the order is on hold and the message "No payment details have been recorded" is displayed.

2.7.6 Inquiring About Returns and Exchanges

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

1. Do one of the following to open the Return/Exchange Details screen:
 - From Tasks > Frequent Queries, select Have you received my returns?
 - From Tasks > Frequent Queries, select Where are my exchange items?
 - From Tasks > Frequent Queries, select Why wasn't I refunded?
 - From Tasks > Frequent Queries, select How much will I be refunded?
 - From Tasks > Other Tasks, select View Return/Exchange Details.

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

You can view details about the return items such as the item ID and description, item quantity, unit price, status, return reason, and whether or not the customer can keep the shipped item.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

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

To view more information about an exchange order, click on the View Exchange Summary hyperlink. The Order Summary screen for the exchange order is displayed. For more information about viewing the order summary screen, see [Section 2.1.4, "Viewing Order Summary"](#).

2. To see the breakup of totals, click the View/Change Charge Details hyperlink corresponding to the total return values or the total exchange values. For more information about viewing charge details, see [Section 2.3.11, "Adding or Modifying Charges"](#).
3. Click the View Details hyperlink corresponding to the amount refunded. The Refund Details screen is displayed where you can view the refund amount, amount applied to an exchange (if available), and the total return value processed.
4. Click Close.

2.7.7 Reconfiguring Items

Sterling Call Center and Sterling Store provides rich functionality to reconfigure bundle items. For example, if the customer has ordered for a computer and wants to change the configuration of the processor, this task enables you to change the necessary configurations. To change the configuration of an item, you must first search for the order. For more

information about searching for an order, see [Section 2.1, "Performing Search Tasks"](#).

1. From Tasks > Other Tasks, select Reconfigure Items. The Reconfigure Items screen is displayed.

Note: If the items on the order are not configurable, the message "There are no lines on this order which can be configured" is displayed.

2. In the Configure Order Lines panel, you can view the details of the item such as the item ID, description, bundle unit price, ordered quantity, status. Click the Reconfigure link in the Reconfigure column. The Reconfigure screen is displayed.
3. Click Next. The Change Fulfillment Options screen is displayed. For more information about changing the fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#).
4. Click Next.
 - If any order lines are being delivered and the newly added lines require a new appointment or an existing appointment needs to be retaken, the Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about viewing the service fulfillment summary, see [Section 2.5.6, "Service Fulfillment Summary"](#).
 - If there are no order lines to be delivered, the Payment Confirmation screen is displayed. For more information about viewing and confirming the payment details, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).
 - If you are not required to enter the payment information, the Order Summary screen is displayed.

2.8 Performing Customer Tasks

This section explains how to perform the following customer tasks:

- [Creating a Consumer Customer](#)
- [Creating a Business Customer](#)
- [Managing Customer Contacts](#)
- [Resetting a User's Password](#)
- [Managing Business Customer Information](#)
- [Managing Customer Addresses](#)
- [Managing Customer Payment Method](#)
- [Assigning Customer to a Team](#)
- [Customer User Assignments](#)
- [Customer Self Assignments](#)
- [Viewing Account Activity](#)
- [Viewing and Adding Customer Notes and Contact Notes](#)

2.8.1 Creating a Consumer Customer

Sterling Call Center and Sterling Store provides the functionality to create, manage, and view consumer customers.

To create a consumer customer:

1. From the Quick Access screen, navigate to Tasks > Customer, and select Create Consumer.

Note: If the user has access to multiple enterprises, and the enterprises are associated to more than one Customer Master Organization, the Select Enterprise pop-up window is displayed. Select an enterprise from the drop-down list, and click the Confirm button.


The Create Consumer screen is displayed.

2. In the Customer Account panel, enter the customer's first name, middle initial, last name, e-mail address, job title, and department.

3. In the Web User panel, you have the option to create a web user by entering a login ID and locale for the customer. When you add information in these fields, a web user is created for this customer, and an e-mail containing the web user's password is sent to the customer.

Note: If you enter a login ID, you must also enter a locale and e-mail address. The login ID cannot be changed after it has been entered and saved.

Note: If the login ID entered is unique across the entire Sterling Call Center and Sterling Store application, the same login ID is also used for the web user. If the login ID entered is unique to only the customer enterprise, the web user's login ID has an underscore and the enterprise organization's suffix appended to the login ID entered.

4. In the Customer Contact Information panel, enter the customer's evening phone number, evening fax number, day phone number, day fax number, and mobile phone number.
5. In the Personal Information panel, provide the customer's date of birth, spouse's date of birth, and wedding anniversary date. To select a date, click the  icon and then select the month, year and day.
6. In the Ship To Address panel, enter the address to where the orders for this customer will be sent. In the Display Address As field, enter a description for the address. This helps you to easily identify the address the customer is referring to when you are performing various address-related tasks.

Note: Based on the configuration, the City and State fields may be populated depending on the information provided in the Country or Region and Postal Code fields.

7. If the Bill To Address of the customer is the same as the Ship To Address, select the Use Ship To Address check box. Alternatively, enter the address of the customer to whom the order is billed to.

8. Click Next. The Add Payment Method screen is displayed based on the configuration.

To add a payment method, click the Add Payment Method hyperlink. In the Add New Payment Method pop-up window, select a payment method from the drop-down list, enter the applicable payment information, and click the Apply button. To add additional payment methods, click the Add Payment Method hyperlink again. To specify a default payment method, select the Default Payment Method check box in the applicable Payment Method panel.

Note: If payment methods do not need to be entered for the customer, proceed to step 9.

9. Click the Confirm button to save the changes. The Consumer Details screen of the newly created consumer customer is displayed.

Note: When a consumer customer is created, the status of the consumer customer is automatically set to Active.

For information about viewing customer details, see [Section 2.1.2.2, "Viewing Customer Details"](#). For information about modifying a consumer customer, see [Section 2.8.3.1, "Modify a Consumer Customer Contact"](#).

2.8.2 Creating a Business Customer

Sterling Call Center and Sterling Store provides the functionality to create, manage, and view business customers.

To create a business customer:

1. From the Quick Access screen, navigate to Tasks > Customer, and select Create Business Customer.

Note: If the user has access to multiple enterprises, and the enterprises are associated to more than one Customer Master Organization, the Select Enterprise pop-up window is displayed. Select an enterprise from the drop-down list, and click the Confirm button.

The Customer Entry screen is displayed.

2. In the Buyer Organization panel, enter the customer ID, business name, Web site, default currency, shipping preferences, and tax exemption code, if tax exempt is selected.

Note: Customer ID cannot be changed after it has been entered and saved.

In addition, enter the following business customer classifications:

- Dunn/Bradstreet #
 - Relationship type
 - Customer level
 - Vertical
3. In the Parent Customer panel, search for an existing business customer to associate to the new customer, if applicable. To search for an existing customer:
 - a. Click the Search button. The Parent Customer Search screen is displayed.
 - b. Enter the appropriate search criteria and click the Search button again. The search results are displayed in the Customer Search Results panel.
 - c. Select the appropriate parent customer, and click the Apply button. The name of the selected parent is displayed in the Parent Customer panel of the Customer Entry screen.
 4. In the Ship To Address panel, enter the address to where orders for this customer should be sent. In the Display Address As field, enter a description for the address. This helps you to easily identify the address the customer is referring to when you are performing various address-related tasks.

Note: Based on the configuration, the City and State fields may be populated depending on the information provided in the Country or Region and Postal Code fields.

5. If the Bill To Address of the customer is the same as the Ship To Address, select the Use Ship To Address check box. Alternatively, enter the address of the customer to whom the order is billed.
6. If the Sold To Address of the customer is the same as the Ship To Address, select the Use Ship To Address check box. Alternatively, enter the address of the customer to whom the order is sold.
7. In the Contact Info panel, enter the phone number, alternative phone number, and e-mail address of the contact.
8. Click the Next button. The Contact Entry screen is displayed, in which you can enter customer contact information.
9. In the Customer Account panel to the left of the screen, enter the customer contact's first name, middle initial, last name, e-mail address, job title, and department.
10. In the Customer Account panel to the right of the screen, you have the option to create a web user by entering a login ID and locale for the customer contact. When you add information in these fields, a web user is created for the customer, and an e-mail containing the web user's password is sent to the customer. In addition, you can select the user roles that you want to assign to this web user.

Note: If you enter a login ID, you must also enter a locale and e-mail address. Login cannot be changed after it has been entered and saved.

Note: If the login ID entered is unique across the entire Sterling Call Center and Sterling Store application, the same login ID is also used for the web user. If the login ID entered is unique to only the customer enterprise, the web user's login ID has an underscore and the enterprise organization's suffix appended to the login ID entered.

11. In the Customer Contact Information panel, enter the customer contact's evening phone number, evening fax number, day fax number, and mobile phone number.
12. In the Ship To Address panel, enter the address to where the orders for this customer should be sent. In the Display Address As field,

enter a description for the address. This helps you to easily identify the address the customer is referring to when you are performing various address-related tasks.

Note: Based on the configuration, the City and State fields may be populated depending on the information provided in the Country or Region and Postal Code fields.

13. If the Bill To Address of the customer contact is the same as the Ship To Address, select the Use Ship To Address check box. If the Bill To Address is not the same as the Ship To Address, enter the appropriate Bill To Address details.
14. If the Sold To Address of the customer contact is the same as the Ship To Address, select the Use Ship To Address check box. If the Sold To Address is not the same as the Ship To Address, enter the appropriate Sold To Address details.
15. Click the Next button. The Payment Entry screen is displayed based on the configuration.

To add a payment method, click the Add Payment Method hyperlink. In the Add New Payment Method pop-up window, select a payment method from the drop-down list, enter the applicable payment information, and click the Apply button. To add additional payment methods, click the Add Payment Method hyperlink again. To specify a default payment method, select the Default Payment Method check box in the applicable Payment Method panel. For more information about adding payment methods, see [Section 2.7.4.1, "Adding New Payment Methods"](#).

Note: If payment methods do not need to be entered for the customer, proceed to step 16.

16. Click the Confirm button to save the changes. The Business Customer Details screen is displayed.

Note: When a business customer is created, the status of the business customer is automatically set to Active.


For information about viewing customer details, see [Section 2.1.2.2, "Viewing Customer Details"](#). For information about managing contacts, see [Section 2.8.3.2, "Manage Business Customer Contacts"](#). For information about managing business customer information, see [Section 2.8.5, "Managing Business Customer Information"](#).

2.8.2.1 Creating Business Customer Contacts

Sterling Call Center and Sterling Store provides the functionality to create business customer contacts. You can access this feature from the Business Customer Details screen and all business customer-related screens.

Note: After a contact is created, if the customer associated to that contact has an editor open, the editor will be closed and the customer details screen will be reopened so that the update is immediately visible.

To create a business customer contact:

1. From the Business Customer Details screen or any business customer-related screen, navigate to Tasks > Customer, and select Create Customer Contact. The Create Customer Contact screen is displayed.
2. In the Customer Account panel, enter the contact's first name, middle initial, last name, e-mail address, job title, and department.
3. In the Customer Contact Information panel, enter the contact's evening phone number, evening fax number, day phone number, day fax number, and mobile phone number.
4. In the Personal Information panel, select the contact's date of birth, spouse's date of birth, and their wedding anniversary date. To select a date, click the  icon and then select the month, year, and day.
5. In the Contact Spending Limit panel, select a currency from the drop-down list, and specify a spending limit. A spending limit prevents an order from being processed if the contact's order is over a specified amount. In addition, specify an approving user and a backup approver. An approving user can approve an order for a contact who has exceeded a spending limit. A backup approver can approve orders for the contact if the contact is unavailable.

6. In the Web User panel, you have the option to create a web user by entering a login ID, locale, and status for the contact. When you include information in these fields, the contact is linked to this web user, and an e-mail containing the web user's password is sent to the customer. In addition, you can select the user roles that you want to assign to this web user.

Note: If you enter information in the Login field, you must also enter a locale and e-mail address. Login cannot be changed after it has been entered and saved.

Note: If the login ID entered is unique across the entire Sterling Call Center and Sterling Store application, the same login ID is also used for the web user. If the login ID entered is unique to only the customer enterprise, the web user's login ID has an underscore and the enterprise organization's suffix appended to the login ID entered.

7. Click the Confirm button. The Contact Details screen of the newly created contact is displayed.

Note: You can view and add contact notes by clicking the View/Add Notes hyperlink in the Important Notes panel of the Contact Details screen.

2.8.3 Managing Customer Contacts

Sterling Call Center and Sterling Store provides the functionality to manage customer contacts.


Note: You can view and add contact notes by clicking the View/Add Notes hyperlink in the Contact Details screen.

2.8.3.1 Modify a Consumer Customer Contact

To modify a consumer customer contact:

1. From the Consumer Details screen, navigate to Tasks > Customer, and select Manage Contact Information. The Manage Contact Information screen is displayed.
 - In the Customer Account panel, you can modify the customer's first name, middle initial, last name, e-mail address, job title, and department.
 - In the Web User panel, you can modify the customer's locale and status.

Note: The Login field is disabled if a login ID was previously provided. For additional information about login IDs, see [Section 2.8.1, "Creating a Consumer Customer"](#).

- In the Customer Contact Information panel, you can modify the customer's evening phone number, evening fax number, day phone number, day fax number, and mobile phone number.
 - In the Personal Information panel, you can modify the customer's date of birth, spouse's date of birth, and wedding anniversary. To select a date, click the  icon and then select the month, year, and day.
2. Click the Confirm button to save the changes.

2.8.3.2 Manage Business Customer Contacts

You can create additional business customer contacts, as well as modify and delete existing business customer contacts. You can access these tasks from the Business Customer Details screen and all the business customer-related screens.

Note: After a contact is created, if the customer associated to that contact has an editor open, the editor will be closed and the customer details screen will be reopened so that the update is immediately visible.


When you select a contact and click the View Contact Details hyperlink in the Business Customer Details screen, the Contact Details screen pertaining to the selected contact is displayed.

Create a Contact

To create a new business customer contact, navigate to Tasks > Customer, and select Create Customer Contact from either the Business Customer Details screen or the Contact Details screen of a business customer contact. For details about how to create a new contact, see [Section 2.8.2.1, "Creating Business Customer Contacts"](#).

Modify a Contact

To modify a business customer contact:

1. From the Business Customer Details screen, select the contact you want to modify and click the View Contact Details hyperlink. The Contact Details screen for that contact is displayed.
2. Navigate to Tasks > Customer, and select Manage Customer Contact. The Manage Customer Contact screen is displayed.
 - In the Customer Account panel, you can modify the contact's first name, middle initial, last name, e-mail address, job title, and department.
 - In the Customer Contact Information panel, you can modify the contact's evening phone number, evening fax number, day phone number, day fax number, and mobile phone number.
 - In the Personal Information panel, you can modify the contact's date of birth, spouse's date of birth, and wedding anniversary. To select a date, click the  icon and then select the month, year, and day.
 - In the Contact Spending Limit panel, you can modify the currency, spending limit, approving user, and backup approver. A spending limit prevents an order from being processed if the contact's order is over a specified amount. An approving user can approve an order for a contact who has exceeded a spending limit. A backup approver can approve orders for the contact if the contact is unavailable.
 - In the Web User panel, you can modify the contact's locale, status, and user roles.

Note: The Login field is disabled if a login ID was previously provided. For additional information about login IDs, see [Section 2.8.2, "Creating a Business Customer"](#).

3. Click the Confirm button to save the changes.

Delete a Contact

To delete a contact:

1. From the Business Customer Details screen, select the contact that you want to delete, and click the View Contact Details hyperlink. The Contact Details screen for that contact is displayed.
2. Navigate to Tasks > Customer, and select Delete Customer Contact. The Contact Deletion pop-up window is displayed, prompting you to confirm the deletion.
3. Click the Yes button to confirm the deletion. The corresponding contact is removed from the Business Customer Details screen.

Modify a Contact's Addresses

You can modify a contact's addresses from the Business Customer Details screen and all business customer-related screens. To modify a contact's addresses, navigate to Tasks > Customer, and select Manage Customer Addresses. The Manage Customer Addresses screen is displayed. For additional information about managing customer addresses, see [Section 2.8.6, "Managing Customer Addresses"](#).

Modify a Contact's Payment Methods

You can modify a contact's payment methods from the Business Customer Details screen and all business customer-related screens. To modify a contact's payment methods, navigate to Tasks > Customer, and select Manage Customer Payment Methods. For additional information about managing payment methods, see [Section 2.8.7, "Managing Customer Payment Method"](#).

2.8.4 Resetting a User's Password

A customer may call the Sterling Call Center and Sterling Store because the customer forgot the password for logging into the retailer's Web site.

Sterling Call Center and Sterling Store provides the functionality to reset a user's password.

Note: This functionality is available only if a login ID was previously entered for the consumer customer or business customer contact, resulting in a Web user being created for the corresponding consumer customer or business customer contact.

For a consumer customer, you can access this feature from the Consumer Details screen. For a business customer contact, you can access this feature from the Contact Details screen.

To reset a user's password:

1. From the Quick Access screen, navigate to Tasks > Customer, and select Reset User Password. The Reset User Password pop-up window is displayed, prompting you to confirm that the user wants to have the password reset.
2. Click either the Confirm button to reset the password, or the Cancel button to cancel the reset password action.

If you click the Confirm button, a new password is automatically generated, and an e-mail is sent to the user. The e-mail contains the following information:

- A link to the Web site that contains a reference for the user to reset the password. Using this link, the user can immediately reset the password.
- A request stating that the user should change the password the next time the user logs in to the Web site.

2.8.5 Managing Business Customer Information

Sterling Call Center and Sterling Store provides the functionality to manage business customer information. You can access this feature from the Business Customer Details screen.

To manage business customer information:

1. From the Business Customer Details screen, navigate to Tasks > Customer, and select Manage Customer Information. The Manage Customer Information screen is displayed.
2. In the Buyer Organization panel, you can modify the business name, Web site, status, shipping preferences, and tax information.

In addition, you can modify the following business customer classifications:
 - Dunn/Bradstreet #
 - Relationship type
 - Customer level
 - Vertical
3. In the Parent Customer panel, you can change the parent customer, as follows:
 - a. Click the Search button. The Parent Customer Search screen is displayed.
 - b. Enter the appropriate search criteria and click the Search button again. The search results are displayed in the Customer Search Results panel.
 - c. Select the appropriate parent customer and click the Apply button. The parent customer's name is displayed in the Parent Customer panel of the Manage Customer Information screen.
4. In the Customer Currencies panel, you can modify the selected currencies. To select a default currency, select a currency check box and then select a currency from the Default Currency drop-down list.
5. Click the Confirm button to save your changes.

2.8.6 Managing Customer Addresses

You can define multiple addresses for each customer. To manage customer addresses, you must first search for a customer. For more information about searching for a customer, see [Section 2.1.2, "Searching for a Customer"](#). Double click the appropriate customer record or contact record. The details screen for the applicable consumer customer, business customer, or business customer contact is displayed.

1. From Tasks > Customer, select Manage Customer Addresses. The Manage Customer Addresses screen is displayed.

If an address description has been provided, the address description is displayed in the corresponding address panels within the Customer Addresses panel. For more information about entering an address description, see [Section 2.3.2.3, "Adding or Modifying Addresses"](#).
2. To modify an address, click the Modify Address hyperlink in the corresponding Customer Address panel. The Modify Address pop-up window is displayed. Modify the information as applicable, and click Apply.
3. To select an address as the default bill to address, select the Default Bill To Address check box.
4. To select an address as the default ship to address, select the Default Ship To Address check box.
5. To select an address as the default sold to address, select the Default Sold To Address check box.
6. To delete an address, click the Delete hyperlink in the corresponding Customer Address panel. The Confirm Address Deletion pop-up window is displayed. Click OK to confirm the deletion. The applicable address panel is removed from the Manage Customer Addresses screen.
7. To add a new address, click the Add Address hyperlink. The Add New Customer Address pop-up window is displayed. Enter the appropriate information and click Apply.
8. Click Confirm to save the changes and return to the details screen of the applicable consumer customer, business customer, or business customer contact.

2.8.7 Managing Customer Payment Method

You can define multiple payment methods for a customer, based on the configuration. To manage customer payment methods, you must first search for a customer. For more information about searching for a customer, see [Section 2.1.2, "Searching for a Customer"](#). Double click the appropriate customer record or contact record. The details screen for the applicable consumer customer, business customer, or business customer contact is displayed.

1. From Tasks > Customer Tasks, select Manage Customer Payment Methods. The Manage Customer Payment Methods screen is displayed.
2. You can view all the payment methods that exist for the customer.
3. To delete a payment method, click the Delete hyperlink.
4. To modify the attributes of a payment method, click the Modify hyperlink. The Modify Payment Method pop-up window is displayed.
You can modify all attributes of a customer payment method, except the following:
 - For the Credit Card payment method, you cannot modify the Credit Card #.
 - For the Customer Account payment method, you cannot modify the Account #.
 - For other payment methods, you cannot modify any attribute that has a unique identifier.
5. To add a new payment method, click the Add Payment Method hyperlink. The Add New Payment Method pop-up window is displayed. For more information about adding a new payment method, see [Section 2.7.4.1, "Adding New Payment Methods"](#).

Note: On customer accounts, the currencies displayed are the currencies that are defined for the enterprise to which the customer belongs.

6. Click Confirm to save the changes and return to the details screen of the applicable consumer customer, business customer, or business customer contact.

2.8.8 Assigning Customer to a Team

Sterling Call Center and Sterling Store enables you to assign customers to a team after the customer is created. A supervisor can assign a customer from his team to any of his sub teams. To assign a customer to a team, you must first search for a customer. For more information about searching for a customer, see [Section 2.1.2, "Searching for a Customer"](#).

1. From Tasks > Customer, select Assign Customer To Team. The Manage Team Assignments screen is displayed.
2. In the Assigned Teams panel, you can view the customer ID and organization.
3. In the Available Teams panel, you can view the list of teams assigned to the supervisor.
4. In the Assigned Teams panel, you can view the list of teams currently assigned to the customer.
5. Click the arrow buttons to move the teams from one panel to the other. You can also drag a team from one panel and drop it into the other panel.

Note: This task is permission controlled and is displayed only if the user has permissions to access the customer record.

2.8.9 Customer User Assignments

Sterling Call Center and Sterling Store enables you to assign customers to a user after the customer is created. A supervisor can assign a customer from his team to any of the users in his team.

To assign a customer to a user:

1. From Tasks > Customer, select Customer User Assignments. The Manage User Assignments screen is displayed.
2. In the User Search Criteria panel, enter the appropriate search criteria and click Search. The search results are displayed in the User List panel. Select the appropriate user and click Next.
3. In the Available Customers panel, you can search for a customer. Enter the appropriate search criteria and click Search.
4. In the Selected User panel, you can view the details of the selected user such as the user name, first name and last name.
5. In the Available Customers panel, you can view the list of customers assigned to the supervisor.
6. In the Assigned Customers panel, you can view the list of customers currently assigned to the user.

7. Click the arrow buttons to move the customers from one panel to the other.

Note: This task is permission controlled and is displayed only if the user has permissions to access the customer record.

2.8.10 Customer Self Assignments

Sterling Call Center and Sterling Store enables you to assign customers to a user, once the customer is created. A user can assign a customer to himself only if the user is assigned permissions to access the customer record.

To assign a customer to a user:

1. From Tasks > Customer, select Customer Self Assignments. The Manage Subscriptions screen is displayed.
2. In the Available Customers panel, you can search for a customer. Enter the appropriate search criteria and click Search.
3. In the Available Customers panel, you can view the list of available customers.
4. In the Assigned Customers panel, you can view the list of customers currently assigned to the user.
5. Click the arrow buttons to move the customers from one panel to the other. You can also drag a customer from one panel and drop it into the other panel.

Note: This task is permission controlled and is displayed only if the user has permissions to access the customer record.

2.8.11 Viewing Account Activity

Sterling Call Center and Sterling Store provides the functionality to view the Sterling Multi-Channel Selling Solution's Account Activity.

To view the Sterling Multi-Channel Selling Solution's Account Activity, from Tasks > Other Tasks, select View Account Activity. The Sterling Multi-Channel Selling Solution's Account Activity screen is displayed.

This screen provides access to the Sterling Multi-Channel Selling Solution's CSR work space. From here, the user can access the Activity, Quotes, Wish Lists, and Registries tasks. The user can modify carts and quotes through the Sterling Multi-Channel Selling Solution before the order is placed.

The Wish Lists and Registries tasks allow the user to create, modify and view wish lists and registries for the customer they are working with. The user can also place order for the items on the customer's lists or other customer's public wish lists or registries. For more information about account activity, see the *Sterling Multi-Channel Selling Solution Administration Guide*.

Note: A user can launch the Sterling Multi-Channel Selling Solution's Account Activity only if the user belongs to a user group that has the permissions to launch the Order Selling Account Activity screen.

2.8.12 Viewing and Adding Customer Notes and Contact Notes

Sterling Call Center and Sterling Store provides the functionality to enter additional notes about a customer or contact. For example, you may want to add a note stating that a customer can be contacted only on Tuesdays and Thursdays.

To view the notes pertaining to a customer or contact:

1. In the details screen of the customer or contact, click the View/Add Notes hyperlink in the Important Notes panel. The Customer Notes screen for a customer displays all the notes associated with the customer. The Customer Notes screen for a contact displays all the notes associated with the contact.
2. From the Filter by Note Type drop-down list, select a note type to view the notes pertaining to that note type.
3. From the Filter by Contact Method drop-down list, select a contact method to view notes pertaining to that contact method. For

example, to view notes related to a customer's call, select Phone as the contact method.

4. In the Include panel:
 - Select the Lower Priority Notes check box to include lower priority notes.
 - Select the Include Internal Notes check box to include notes marked for internal viewing only.
 - Select the System check box to view system-generated notes.
 - Select the User check box to view notes that were entered manually.
5. By default, the notes are truncated and displayed.
 - Click the Expand All Notes hyperlink to expand all the notes displayed in the Customer Notes screen.
 - Click the Expand hyperlink next to a truncated note to expand that note.

To add a note pertaining to a customer or contact:

1. From the Type drop-down list in the Customer Notes screen, select the appropriate note type, if applicable.
2. From the Contact Method drop-down list, select the appropriate contact method, if applicable.
3. Select the Mark Priority As High check box if the note is of high priority.
4. Select the For Internal User Only check box to mark the note for internal viewing only.
5. Enter Contact Details, such as the e-mail address or the telephone number of the customer.
6. Enter the text of the note in the space provided.
7. Click the Add Note button. The note is added and saved against the customer or contact.
8. Click the Close button.

2.9 Performing User Management Tasks

This section explains how to perform the following user management tasks:

- [Managing Users](#)

A user is an employee of the enterprise organization who can log in to the Sterling applications.

- [Managing User Teams](#)

A user team is a collection of users who have common data and user interface access requirements. User teams can have access to specific document types, enterprises, ship nodes, customers, and screens within the user interfaces.

2.9.1 Changing Passwords

You can change your password in this screen.

To change your password:

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

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

2.9.2 Managing Users

Sterling Call Center and Sterling Store enables the CSR to create and manage users. For example, a CSR lead may need to create an additional CSR user within the organization.

2.9.2.1 Creating a User

With the required privileges, you can create users for any organization for which you have access.

To create a user:

1. From the Quick Access screen, navigate to Tasks > User Management, and select Create User. The User Entry screen is displayed.
2. Provide the following information in the Primary User Information panel:
 - From the Organization drop-down list, select the Organization to which you want to assign the user.
 - In the Login field, enter the User ID that the user uses to access the system.
 - From the Department drop-down list, select the department within the organization to which the user is assigned.
 - In the Name field, enter the user's name.
 - In the E-mail Address field, enter the user's e-mail address.
 - From the Theme drop-down list, select a theme.
The theme determines the color scheme of the Sterling applications for that user. The available themes are Earth, Ice, Jade, and Sapphire.
 - From the Menu Group drop-down list, select the menu group representing the menu options you want this user to see when logging in to the Sterling Call Center and Sterling Store Consoles.
 - From the Locale drop-down list, select the locale in which the user is located.

Note: A user who is configured for the Eastern Time Zone but logs in while physically in the Pacific Time Zone, sees locale-specific information pertaining to the Eastern Time Zone.

- From the Team drop-down list, select the team to which you want to assign the user.

Note: The list contains all the teams configured for the organization to which the user belongs, and the parent organization, if applicable. In addition, it contains the teams configured for the user's customer master organization.

- Select the Active check box if the user is currently active in the organization. Inactive users cannot log in.
 - Select the Supervisor check box if the user is a personnel supervisor. A supervisor can access all customers associated to his team.
 - In the Customer Limit field, enter the maximum number of customers that this user can be assigned to manage. If zero is entered, the user can be assigned to an infinite number of customers.
3. In the Contact Address panel, click the Modify Address hyperlink to add a contact address. In the Modify Address pop-up window, enter the user's contact address, and click the Apply button to save the information.
 4. In the Bill To Address panel, click the Modify Address hyperlink to add a bill to address. In the Modify Address pop-up window, enter the user's bill to address, and click the Apply button to save the information.
 5. In the User Roles panel, select the user roles to which you want to assign this user. The user roles define the permissions that the user will have when accessing any of the Sterling applications.
 6. Click the Next button to save the changes. The Queue Subscriptions screen is displayed.
 7. The Queue Subscriptions screen enables you to subscribe users to queues so that the users will receive alerts.

The left panel lists the available queues, and the right panel lists the queues to which the user is subscribed. If you are creating a new user, the right panel will be empty. To assign a new queue or

additional queues to the user, select the queue in the left panel, click the Assign button, and the queue name moves to the Assigned Queues panel.

8. Click the Confirm button. The user is created.

2.9.2.2 Modifying a User

To modify an existing user's information, search for the user whose information you want to update, and modify the user's information in the Modify User screens.

To modify a user:

1. From the Quick Access screen, navigate to Tasks > User Management, and select Modify User. The User Search screen is displayed.

2. Search for the user whose information you want to modify:

In the User Search Criteria panel, enter the applicable search criteria and click the Search button. If only one result is returned, the information for that user is automatically displayed. If more than one result is returned, the search results are displayed in the User Search Results panel. From the User Search Results panel, select the user whose information you want to modify. The details of the user are displayed in the User Entry screen.

3. Modify the user's information.

Note: The Organization and Login fields are disabled. Changes cannot be made to these fields after the user has been created.

4. Click the Next button. The Queue Subscriptions screen is displayed.
5. Modify the queues to which the user is subscribed, and click the Confirm button.

2.9.3 Managing User Teams

Sterling Call Center and Sterling Store enables the CSR to create and manage user teams.

A team is created so that specific CSR users can be assigned to a set of customers. This enables customers to maintain relationships with specific CSRs and receive better customer service.

2.9.3.1 Creating a User Team

To create a user team:

1. From the Quick Access screen, navigate to Tasks > User Management, and select Create User Team. The Create User Team screen is displayed.
2. Provide the following information in the Team Information panel:
 - In the Team ID field, enter an identifier for the user team.
 - In the Description field, enter a brief description of the user team.
 - From the Parent Team drop-down list, select the parent team for this user team.

All the data security permissions that are defined by the parent team will be inherited by the user team, except for the customer access permissions, which you can define as described below.

- From the Organization drop-down list, select the organization to which you want to assign the user team.

Note: The Organization field is displayed only if the user has access to more than one customer master organization.

- Select the appropriate Customer Access Mode:
 - If you select All Customers, the user team can view and manage all customers. Proceed to step 5.
 - If you select Assigned Customers, you must assign customers to the user team, as described in step 3 and step 4.
 - If you select User To Customer Assignment Required, you must assign customers to the team so that those customers can be assigned to users on that team in the future. When customers are assigned to users in the team, only those users and supervisors can access the customers' data.

For information about how to assign customers to users, see [Section 2.8.9, "Customer User Assignments"](#) and [Section 2.8.10, "Customer Self Assignments"](#).

3. Search for customers in the Find Existing Customer panel, as follows:
 - a. Select a customer organization from the Customer Organization drop-down list to search for customers belonging to the selected customer organization.

Note: The Customer Organization drop-down list is displayed only if the user has access to more than one customer master organization.

- b. Search for customers you want to assign to the user team. You can search by business customer or consumer customer. Enter the applicable search criteria and click the Search button. The results are displayed in the Customer Search Results panel.
4. Assign customers to the user team, as follows:
 - a. In the Customer Search Results panel, select a customer that you want to assign to the user team.
 - b. In the Assigned Customers panel, select either Business Assignments or Consumer Assignments.
 - c. Click the Assign button. The customer's name will be moved to the Assigned Customers panel.

To assign additional customers to the team, repeat this step.
5. Click the Confirm button to save your changes.

2.9.3.2 Managing a User Team

To manage a user team, search for the team whose information you want to update, and modify the team's information in the Team Management screen.

To manage a user team:

1. From the Quick Access screen, navigate to Tasks > User Management, and select Manage User Teams. The Manage User Team screen is displayed.

2. Search for the user team whose information you want to modify.

In the Team Search Criteria panel, enter the applicable search criteria and click the Search button.

Note: The Organization field is displayed only if the user has access to more than one customer master organization.

If only one result is returned, the information for that user team is automatically displayed. If more than one result is returned, the search results are displayed in the Team ID panel. From the Team ID panel, select the name of the team whose information you want to modify. The information pertaining to that team is displayed.

3. You can make the following changes to the user team:

- Modify the Description and Parent Team fields.

Note: The Team ID field is disabled. Changes cannot be made to this field after the team has been created.

- Change the Customer Access Mode:
 - If you change the Customer Access Mode to All Customers, the team will be able to view and manage all the customers and, therefore, the customer search and assignment panels will no longer be visible.
 - If you change the Customer Access Mode to Assigned Customers, you can assign customers to the user team.
 - If you change the Customer Access Mode to User To Customer Assignment Required, you can assign customers to the user team so that those customers can be assigned to users on that team in the future.

For information about how to assign customers to users, see [Section 2.8.9, "Customer User Assignments"](#) and [Section 2.8.10, "Customer Self Assignments"](#).

- You may assign new customers to the user or remove customers from the Assigned Customers lists.

4. Click the Confirm button to save your changes.

2.10 Performing Return Order Tasks

When a customer wants to return items, you can perform the following tasks to accomplish this:

- [Creating a Return Order](#)
- [Adding a Return Reason](#)
- [Adding Items to an Exchange](#)
- [Viewing or Modifying Return and Exchange Fulfillment Options](#)
- [Viewing or Modifying Fulfillment Summary](#)
- [Viewing or Modifying the Payment Summary](#)
- [Changing Return Address](#)
- [Viewing or Modifying Service Fulfillment Summary](#)
- [Issuing a Refund](#)
- [Modifying Service Appointments](#)
- [Reporting Extra Items](#)
- [Reporting Wrong Items](#)
- [Reporting Unexpected Items](#)
- [Canceling a Return Order](#)
- [Creating an Exchange Order](#)
- [Changing Return Method](#)

2.10.1 Creating a Return Order

You can create a return from single or multiple sales orders. Create the return order as follows:

1. Select Create Return from the Quick Access Task Panel. Click Confirm.
2. The four Return Order tabs that are displayed enable you to begin the return process in any of four ways:

- **By Order** - Either enter the Order Number or search for the order. (For information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).)

When you locate the order, it is displayed. Select the check boxes for the lines that are to be returned or select the Select All check box at the top of the screen. (You can also include lines from multiple orders on the same return.) When you click Next, the Return Reason screen is displayed. For more information on the Return Reason screen, see [Section 2.10.2, "Adding a Return Reason"](#).

- **By Tracking # (container)** - Enter the Tracking Number of a container. The Order Lines are displayed for that container. Either select the check boxes for the lines that you want to return or select the Select All check box at the top of the screen. You can also select the Return Specific Container hyperlink on this screen. This displays a list of all containers that contain items being returned. Click the Include in Return check box to return an entire container or several containers. Click Confirm.
- **By Items Without An Order** - On entering the Item ID, the item is displayed as a line not associated with an order. When you click Next, the Return Reason screen is displayed.
- **By Extra Item** - This tab is for orders that a customer received by mistake. On entering the Item ID, the item is displayed as a line that was received but not ordered. When you click Next, the Return Reason screen is displayed.

You can combine any of these methods to create a return order that includes lines from sales orders, lines without orders, and lines of extra items. You can also indicate whether the items are being returned by the customer who originally purchased it or by a gift recipient.

If you do not enter the correct Item ID, Order Number, or Tracking Number, an error message is displayed indicating that the Item Number, Order Number, or Tracking Number could not be found. For information about searching for an item, see [Section 2.1.3, "Searching for an Item"](#). For information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).

2.10.2 Adding a Return Reason

The Return Reason screen displays the list of items you have designated for return. It enables you to review the return policy for each item, override the return policy (if applicable), and enter the return reason. You can use this screen as follows:

1. Review the items on the screen to determine whether these are the items that you want to return. Select the Remove Line hyperlink to delete an item on the return order.
2. Highlight each return line to view the return policy for that item.
3. To override the return policy on an item, click the Override Return Policy button. If an item is not returnable, override the Return Policy to continue. The Override Return Policy text screen is displayed, enabling you to perform the following actions:
 - Select an icon that signifies the customer's level of satisfaction.
 - Select a Contact Method (E-mail, Phone, or In Person) and enter Contact Details, such as the customer's phone number.
 - Mark the priority of the note as High.
 - Enter text to describe the reason for the override.
 - Click Confirm to close the Override Policy text screen.
4. From the Return Reason drop-down list, select the reason for returning the item. You must select return reason; otherwise, items cannot be returned.
5. In addition to the Return Reason, more options are displayed in the panel on the right:
 - **Add Return Service** - Click this hyperlink to display a pop-up listing available return services for the selected item. Select the service and click Add to Order. This adds the service line to the Return Reason screen. The service is displayed under the associated line with a Service icon.
 - **Price Match This Item** - If a customer indicates that this item is offered for a lower price by a competitor, click this hyperlink to enter a price match.

See [Section 2.6.1, "Matching an Item's Price"](#) for more information about price matching an item.

After performing the a price match, the wizard returns to the Return Reason screen.

The corresponding line or all related lines are deleted from the return order.

- **Create Appeasement** - If a customer is dissatisfied with any aspect of the product or service, click this hyperlink to select an appropriate offer for appeasement. You can choose an appeasement for an item or for an entire order.

After performing the an appeasement, the wizard returns to the Return Reason screen.

The corresponding line or all related lines are deleted from the return order.

6. For a simple return without exchange, click Next to go to the Fulfillment/Return Summary.
7. To exchange the return item for the same item, select the Include on exchange order check box. This automatically preselects the Exchange Order Required check box at the top of the screen. Click Next to go to the Add Items screen that has details for the same exchange item filled in. See [Section 2.10.4, "Adding Items to an Exchange"](#).
8. To exchange the return item for a different item, select the Exchange Order Required check box at the top of the screen. (The Include on exchange order check box on the side of the screen should not be selected.) Click Next to go to the Add Items screen or Customer Identification screen.


Note: If a draft exchange order is already created for some items and if you try to add the same items to the draft exchange order by navigating back to the Return Reason screen, the newly added items will not be added to the exchange order.

You can add the same item to the exchange order as a new line or you can increase the quantity for the existing line.

2.10.3 Identifying a Customer

The Customer Identification screen is displayed only when the customer is not identified when a return is created. Typically, the customer for a return is the same as the original sales order customer. However, if you create a return for Items Without An Order or Extra Items, or if the items are being returned by a gift recipient, you should identify the customer before creating the return. In the Customer Identification screen, you can search for an existing customer and create a new Business customer or Consumer customer.

To search for an existing customer:


1. Select the appropriate Customer Type.
2. Enter the required information pertaining to the customer and click Search.
3. The search results are displayed in the Customer Search Results panel. If you cannot find the customer you are searching for, click the  icon to display the search criteria again. Enter a more restrictive search criteria for the selected task and click Search.
4. Select the appropriate customer that you need from the Customer Search Results panel. The details pertaining to that customer are displayed in the Customer panel.
5. If the customer does not exist, create a new Business customer or Consumer customer. To create a Consumer customer, click Create Consumer. For more information about creating a Consumer customer, see [Section 2.8.1, "Creating a Consumer Customer"](#).

To create a Business customer, click Create Business. For more information about creating a Business customer, see [Section 2.8.2, "Creating a Business Customer"](#).

6. Click Next to go to the Add Items to Exchange screen or Exchange Fulfillment Options screen.

2.10.4 Adding Items to an Exchange

If you are performing an even exchange, the Add Items screen is displayed with the items automatically filled in. You can add more items to the exchange, if necessary.

If you are not performing an even exchange, you can add exchange items on this screen. In the Item column, enter the identifier of the item or item description, or choose the  to select an item from the Item List. You can also click the Add More Lines hyperlink. For more information about performing an advanced item search, see [Section 2.1.3.4, "Performing an Advanced Item Search"](#).

You can perform the following options on the Add Items screen:

- Change the quantity on exchange lines.
- Change the Unit of Measure (UOM) when performing an uneven exchange.
- Override the price on the exchange line.
- Select the fulfillment options for the exchange line.
- Change the default exchange type, which defines how refunds are applied to the exchange.

After completing any modifications, click Next to go to the Exchange Fulfillment Options screen.

2.10.5 Viewing or Modifying Return and Exchange Fulfillment Options

The Exchange Fulfillment Options screen enables you to change the fulfillment method on the exchange order, including shipping/delivery addresses and pick up locations.

For more information about changing the fulfillment method, see [Section 2.5.1, "Modifying Fulfillment Options"](#).

The customer information pertaining to the associated return order is filled in on the Exchange Fulfillment Options screen.

If customer information is missing, click Next to display the Customer Information screen. For more information about performing customer searches, see [Section 2.1.2, "Searching for a Customer"](#).

2.10.6 Viewing or Modifying Fulfillment Summary

The Fulfillment Summary screen displays return and exchange lines grouped by fulfillment method and address. You can specify Shipping, Pick Up, and Delivery methods.

2.10.6.1 Return Fulfillment Method: Shipping Panel

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

1. In the Lines being shipped to panel, you can view the return items that are being shipped back.
2. You can view the details of the item such as the item ID, quantity and unit price.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

3. In the Ship To items panel, you can view the return address to which the item will be shipped.
4. To change the fulfillment method to Pick Up, select the lines and click Change To Pick Up. The selected item is moved to the Return Pick Up Summary panel.

Note: The Change to Pick Up button is displayed only if the item supports Pick Up return method.

5. Click Next.
 - If any order lines are being delivered and the newly added lines require a new appointment or a changed appointment, the Change Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about viewing the service fulfillment summary, see [Section 2.5.6, "Service Fulfillment Summary"](#).
6. To allow the customer to keep an item, select the line and click the Customer Can Keep button. The selected item is moved to the Keep These Items panel.

2.10.6.2 Return Fulfillment Method: Pick Up Panel

You can view the return fulfillment summary for the "Pick Up" fulfillment method.

1. In the Lines being picked up from panel, you can view the return items that are being picked up.
2. You can view the details of the item such as the item ID, quantity and unit price.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

3. In the Pick up items from panel, you can view the address from which the items will be picked up.
4. To change the address from which the items are being picked up, select the lines and click the Change Address button. The Add a New Address pop-up window is displayed. Enter the appropriate details and click Confirm.
5. Click Next.
 - If any order lines are being delivered and the newly added lines require a new appointment or a changed appointment, the Change Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about viewing the service fulfillment summary, see [Section 2.5.6, "Service Fulfillment Summary"](#).
6. To change the fulfillment method to shipping, select the lines and click the Change To Shipping button. The selected item is moved to the Return Shipment Summary panel.
7. To allow the customer to keep the items, select the lines and click the Customer Can Keep button. The selected item is moved to the Keep These Items panel.

2.10.6.3 Keep These Items Panel

You can view the details of the items that the customer can keep.

1. In the Keep these items with our compliments panel, you can view the details of the items, such as the item ID, description, quantity, and unit price.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.


For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

2. Click Change To Shipping to ship the item back. The selected item is moved to the Return Shipment Summary panel.
3. Click Change To Pick Up for the item to be picked up. The selected item is moved to the Return Pick Up Summary panel.
 - If any order lines are being delivered and the newly added lines require a new appointment or a changed appointment, the Change Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about viewing the service fulfillment summary, see [Section 2.5.6, "Service Fulfillment Summary"](#).

Note: The Change to Pick Up, Change to Shipping buttons are displayed only if the item supports Pick Up, Shipping return methods.

2.10.6.4 Exchange Fulfillment Method—Shipping Panel

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

- The address to which the item is shipping is displayed in the header panel, if the fulfillment method is "Shipping".
- The  icon indicates that the item is a gift and can be picked up or shipped to the gift recipient. For more information about setting up gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- The open box icon indicates that the item is an open-box item. For more information about open-box items, see [Section 3.3.9, "Adding Open Box Items"](#).
- The item image displays an image of the actual item.
- The item description and the item identifier display.

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

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

- The Available column displays the latest date on which the product is available. If items are unavailable, the column is displayed in red, indicating unavailability.
- The Level of Service column enables you to change the carrier service with cost from the drop-down list.

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

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

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

Note: When the parent bundle line is cancelled, all the components lines are automatically cancelled.

Note: If an order with future availability contains an item whose level of service is not selected, the exact availability date will be displayed only after the order is scheduled. For the exact availability date, refer to the Fulfillment Summary screen.

When the action is changed from Shipping to 'Change to Pick Up', the screen returns to the Change Fulfillment Options screen and the system automatically checks the box against each modified order line. For more information about the fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#).

- Click the Gift Options button to modify the gift options for the selected items. You must check the box for the item for which you want to add or clear the gift information. For more information about gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- Click 'Go to the Change Fulfillment Options' if you want to make changes to the fulfillment methods. For more information about changing fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#).



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

- Click Confirm or Next. All items in the order line are reserved.

- If any exchange lines are being delivered and the newly added lines require a new or changed appointment, the Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
- Click Next. The Confirm Payment screen is displayed where you can view the payment details for an order. For more information about payment confirmation, see [Section 2.10.7, "Viewing or Modifying the Payment Summary"](#).


2.10.6.5 Exchange Fulfillment Method—Pick Up Panel

You can view the fulfillment summary for the "Pick Up" fulfillment method.

- If the fulfillment method is "Pick Up", the ship node is displayed.
- The  icon indicates that the item is a gift and can be picked up by the recipient. For more information about setting up the gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- The  icon indicates that the item is an open box. For more information about open-box items, see [Section 3.3.9, "Adding Open Box Items"](#).
- The item image displays an image of the actual item.
- The item description and the item identifier display.
- The Quantity column displays the item quantity.
- The Unit Price column displays the item price for one unit.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

- The Preferred column displays the date on which the customer prefers to pick up the item. Click the  icon to modify the preferred

date for picking up the item. The calendar displays the dates from the initial product ship date. If the product ship date is blank, the calendar does not display any dates.

- The Available column displays the latest date when the product is available in the ship node.
- You can choose any of the following actions from the drop-down list:
 - Change to Shipping
 - Cancel

When the action changes from Pick Up to 'Change to Shipping', the screen returns to the Change Fulfillment Options screen and the system automatically checks the box against each modified order line. For more information about modifying the fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#)

- Click the Gift Options button to modify the gift options for the selected item. You must check the box for the item for which you want to add or clear the gift information. For more information about setting up gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- Click the Change Store Location button to select the store from where you want to pick up the items. You must check the box of the item you want to pick up from an alternate store. For more information about alternate pick up locations or stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
- Click 'Go to Change Fulfillment Options' if you want to make changes to the fulfillment method. For more information about the fulfillment options screen, see [Section 2.5.1, "Modifying Fulfillment Options"](#).
- Click Next. All items in the order line are reserved.
- If a work order or delivery service is required, the Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
- Click Next. The Confirm Payment screen is displayed where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.10.7, "Viewing or Modifying the Payment Summary"](#).

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

Note: After you first visit the Fulfillment Summary screen, if you then make changes elsewhere in the Return Order wizard and revisit the Fulfillment Summary screen, it may not contain changes from your original visit. The Fulfillment Summary screen always chooses options based on the configuration that is set by your enterprise. To help you remember this, a warning message is displayed on the second and subsequent visits to the Fulfillment Summary screen reminding you to review the information carefully on this screen and ensure that options you previously set are still in effect. You can reset these options, if necessary.

After you have finished with the Fulfillment Summary, click Next to view the Payment Return Order Payment Summary. See [Section 2.10.7, "Viewing or Modifying the Payment Summary"](#) for more information.

2.10.7 Viewing or Modifying the Payment Summary

In the Payment Summary screen, you can view payment details such as payment adjustments for return orders and payment adjustments for exchange orders.

In the top left corner of the Payment Summary screen, the Overall Payment Details are displayed. This panel includes Credits from Returns, New Charges from Exchanges, if any, and the Net Balance of the customer refund amount or the amount due from the customer.

The Return Order Totals panel on the lower left lists Refunded Charges, Taxes, and Fees for items being returned. To add or modify return fees:

1. Click the Add/Modify Return Charges button.

2. The Add/Modify Charges screen is displayed. In the Fee Breakup panel, click the Add/Modify hyperlink.
3. The Add/Modify Charges pop-up window is displayed. Click the Add Charges hyperlink.
 - From the Charge Category drop-down list, select a Charge Category.
 - From the Charge Name drop-down list, select a Charge Name.
 - Enter the Charge Amount.
 - Add notes, if necessary.
 - Click Apply.
 - Click Close.
4. Click Close.

These changes are reflected in the totals on the Overall Payment Details panel in the Payment Summary screen.

For more information about adding or modifying charges, see [Section 2.3.11.1, "Adding or Modifying Charges"](#).

The Exchange Order Totals panel on the lower right lists Charges, Taxes, and Discounts for items being exchanged. To add or modify exchange fees:

1. Click the Add/Modify Exchange Charges button.
2. The Add/Modify Charges screen is displayed. In the Charge Breakup panel, click the Add/Modify hyperlink.
3. The Add/Modify Charges pop-up window is displayed. Click the Add Charges hyperlink.
 - From the Charge Category drop-down list, select a Charge Category.
 - From the Charge Name drop-down list, select a Charge Name.
 - Enter the Charge Amount.
 - Add notes, if necessary.
 - Click Apply.
 - Click Close.

4. Click Close.

These changes are reflected in the totals on the Overall Payment Details panel in the Payment Summary screen.

You can enter a payment method in the Payment Methods panel in the top right corner of the Payment Summary screen. To add a payment method:

1. Click the Add Payment Method button.
2. In the Add New Payment Method pop-up window, select the Payment Type from the drop-down list.
3. Depending on the Payment Type that you enter, you may be prompted for more details, such as the customer's name and credit card number.
4. After you have supplied all the Payment Type information, the amount to be paid and the method of payment is displayed in the Payment Methods panel.
5. You can apply a coupon or promotion to this amount by clicking the Add Coupon button.

For more information about adding new payment methods, see [Section 2.7.4.1, "Adding New Payment Methods"](#).

For more information about adding coupons and promotion codes, see [Section 2.7.3, "Adding a Coupon or Promotion Code"](#).

You can also process real-time credit card authorizations while confirming a draft exchange order. For more information about real-time authorizations, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).

2.10.8 Changing Return Address

Sometimes a customer may want to change the address of a return order. To change the return address, you must search for the return order. For more information about searching for a return order, see [Section 2.1.5, "Performing an Advanced Return Order Search"](#).

To change the return address:


1. From Tasks > Return, select Change Return Address. The Change Return Address screen is displayed.

2. To modify the return address, click the Modify Address hyperlink from the appropriate address panel.
3. The Modify Address pop-up window is displayed. You can modify the address accordingly. Click Confirm.
4. Click Next.
 - If any appointment needs to be retaken, the Change Service Appointment screen is displayed. For more information about creating an appointment, see [Section 2.10.11, "Modifying Service Appointments"](#).
 - The Viewing and Confirming Return Order Payment Details screen is displayed if there is a payment impact. For more information about viewing and confirming payment details, see [Section 2.10.7, "Viewing or Modifying the Payment Summary"](#).
 - If you are not required to enter payment information, the Return Order Summary screen is displayed.

2.10.9 Viewing or Modifying Service Fulfillment Summary

You can view the summary of all appointments related to the return order and the corresponding exchange order, if applicable. In the Appointment panel, you can view the appointment number, the current appointment, if an appointment has been taken, and the service charges applicable for the service. You can perform any one of the following actions:

Note: If there are no work orders for the return order, then the message "No valid work orders are existing in this order" is displayed.

1. Click the  icon to view the return/exchange order lines included in the appointment.
2. Click the Change Appointment hyperlink to modify the service appointment. For more information about changing service appointment, see [Section 2.10.11, "Modifying Service Appointments"](#).

Note: If the status modification rules do not allow you to change service appointment, the Change Service Appointment hyperlink is disabled.

3. Click the View/Change Instructions hyperlink to view or modify the service instructions.

Note: If the status modification rules do not allow you to change service instructions, the View/Change Instructions hyperlink is disabled.

4. In case of exchange order lines, the gift options hyperlink is displayed. Click the Gift Options hyperlink. The Mark/Clear item(s) as gift(s) screen is displayed.
 - Choose Mark this line/these lines as gift(s) to mark the item as a gift item.
 - Choose These item(s) are not gift(s) if you no longer want the item to display as a gift item.
 - Click Apply.
5. Click Next.
 - The Viewing and Confirming Return Order Payment Details screen is displayed if there is a payment impact. For more information about viewing and confirming payment details, see [Section 2.10.7, "Viewing or Modifying the Payment Summary"](#).
6. The Return Order Summary screen is displayed.

2.10.10 Issuing a Refund

A customer may call to inquire about why he has not been refunded for items he returned. Sterling Call Center and Sterling Store provides the Issue Refund Now task, which enables you to issue a refund to the customer immediately.

You can start to issue a refund in one of two ways:

- You can issue a refund on items that are not associated with an order by creating a Return 'By Items Without An Order', as described in [Section 2.10.1, "Creating a Return Order"](#). Perform a typical return and follow the return order flow to the Payment Summary, where the customer is issued a refund.
- Search for an existing return order as described in [Section 2.1.5, "Performing an Advanced Return Order Search"](#).

1. From Tasks > Return, select Issue Refund Now. The Issue Refund Now screen is displayed.
2. In the 'Select Lines to Refund Now' panel, select the Select All box to select all the lines for a refund. To select specific lines to refund, check the box for those lines.
3. You can view the details of the item, such as Item ID, fulfillment method, shipment number, refundable quantity, and unit price.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

4. In the Important Notes panel, you can view and add information entered for the order.
5. Click Next. The amount for the selected lines is refunded and the Invoice Details screen is displayed. In the Invoice Details panel, you can view the total refund amount.
6. In the Header Details panel, you can view the Header charge details and tax details.
7. In the Header Charges panel, you can view the charges and charge amount at the header level.
8. In the Tax Breakup panel, you can view the details of the line, such as the Item ID, original order number, quantity, and amount.

9. In the Line Charges panel, you can view the charge and the charge amount of the selected line.
10. Click the Previous button to revisit the previous screen. If there are order lines available for refund, you can select them for an immediate refund.

Note: When you visit the Issue Refund Now screen, if there are no order lines that can be refunded, the message "The order does not contain any order line that can be refunded" is displayed.

11. Click Close. The Return Order Summary is displayed.

2.10.11 Modifying Service Appointments


Sometimes a customer may want to change the service appointment of a return order. To change the service appointment, you must search for the return order. For more information about searching for a return order, see [Section 2.1.5, "Performing an Advanced Return Order Search"](#).

To change the service appointment:

1. From Tasks > Return, select Change Service Appointment. The Service Fulfillment Summary screen is displayed. Click the Change Appointment hyperlink. The Change Service Appointment screen is displayed.

The appointments that exist for the order is displayed in the top panel.

- If you have already taken an appointment, the details about the appointment is displayed.

If there is a problem with the appointment taken, the  icon is displayed.


- If you have not taken an appointment, a "Not Taken" message is displayed.

2. In the Calendar, click the left or right arrow to select the appropriate month and select the day on which you want appointment. By default, the current month is displayed in the calendar.

3. In the Slots panel, select the appropriate slot for the appointment.
Sterling Call Center and Sterling Store provides the ability to switch the calendar view for the selected appointment by clicking any one of the following hyperlinks:
 - Switch to day-first view—This view displays the calendar to the left of the screen. When you select a day, the slots available for that day display to the right.
 - Switch to slot-first view—This view displays the slots to the left of the screen. When you select a slot in the Slots panel, the days available for the selected slot display to the right.

Note: The default calendar view is displayed depending on the rules configured. For more information about configuring the service appointments calendar view, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

4. In the Service Instructions panel, you can either enter new service instructions or modify the existing service instructions for the selected appointment.
5. In the Return Order Lines panel, you can view all return items included for the selected appointment.
6. In the Exchange Order Lines panel, you can view all exchange items included for the selected appointment.

In the Problem Line column, the  icon is displayed only if the newly added line cannot be fulfilled for the current appointment.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

In the Available Date column, the earliest date when the product is available is displayed. If items are unavailable, the column is displayed in red.

Note: The Availability Date column is displayed only for exchange order lines.

If you want to change the fulfillment option of a newly added line or or cancel an order line, click the Line Actions hyperlink. The Line Actions pop-up window is displayed. In the Action column, select any one of the following actions from the drop-down list:

- Change to Pick Up
If the item supports the pick up fulfillment method
 - Change to Shipping
If the item supports the shipping fulfillment method
 - Cancel
7. Click Confirm.
 - If you select Change to Pick Up or Change to Shipping action, the Change Fulfillment Options screen is displayed. The boxes of the items that you modified are automatically checked. For more information about modifying the fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#).
 - If you select the Cancel action, the item is cancelled.
 8. Click the Previous button to revisit the previous screen.
 9. Click Save Appointment. The inventory is reserved and the capacity is allocated for the appointment.
 10. Click Next. The Service Fulfillment Summary screen is displayed.

2.10.12 Reporting Extra Items

Sometimes a customer may report that the customer has received extra items. In such situations, the extra items can either be returned back or you can allow the customer to keep the extra items. To report extra

items, you must first search for the order. For more information about searching for an order, see [Section 2.1, "Performing Search Tasks"](#).

To report extra items:

1. From Tasks > Return, select Report Extra Items. The Report Extra Items: Identify Items screen is displayed.
2. In the Identify items that were shipped incorrectly panel, enter the Item ID or click the search icon. The Item Search screen is displayed. Enter the appropriate search criteria and click Search. The search results are displayed in the Item List panel. Select the appropriate item and click Select.
3. If you do not know the item ID, select the Could Not Identify Item option. Enter the quantity of the item, and enter the item description in the Item description panel.
4. To report another extra item, click the Add Another Item button and enter the appropriate details.
5. In the Important Notes panel, you can view any additional information entered for the order. For more information about viewing or adding notes to an order see, [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).
6. Click Next. The Report Extra Items: Fulfillment Summary screen is displayed. For more information about fulfillment summary details of a return item, see [Section 2.10.6, "Viewing or Modifying Fulfillment Summary"](#).
7. Click Next.
 - If there are order lines with fulfillment method as Pick Up, the Change Service Appointment screen is displayed. For more information about creating an appointment, see [Section 2.10.11, "Modifying Service Appointments"](#).
 - If there are no order lines that need to be picked up, the Order Summary screen is displayed.

2.10.13 Reporting Wrong Items

Sometimes a customer may report that he did not receive the items that were ordered. In such situations you may need to reship the items that

were ordered and also create a return for the wrong items that were delivered.

To report wrong items:

1. From Tasks > Return, select Report Wrong Items. The Reship Select Items screen is displayed.
2. In the Shipped items panel, select the reason for reship from the drop-down list.
3. Select the items that you want to reship and enter the quantity to reship.
4. Click Next.
 - If the items are not eligible for a reship, the message "These items are not eligible for a reship. They may have been reshipped." is displayed. Click the Create Follow-up Alert button to create a follow-up alert. For more information about creating an alert, see [Section 2.11.1, "Creating Alerts"](#).
 - To override the validation for reship, select the Override Reship Validation box.

Note: If you want to override reship validation, you must belong to the user group that has permission to override reship validation.

5. Click Next. The Reship Items screen is displayed.

In the available options panel: Select Reship All Items option, to reship all the items.

- a. Click Next. The Identify Items screen is displayed. In the Identify items that were shipped incorrectly panel, enter the Item ID or click the search icon. The Item Search screen is displayed. Enter the appropriate search criteria and click Search. The search results are displayed in the Item List panel. Select the appropriate item and click Select.
- b. If you do not know the item ID, select the Could Not Identify Item option. Enter the quantity of the item, and enter the item description in the Item description panel.

- c. To report another extra item, click the Add Another Item button and enter the appropriate details.
- d. In the Important Notes panel, you can view any additional information entered for the order. For more information about viewing or adding notes to an order see, [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).
- e. Click Next. The Report Extra Items: Fulfillment Summary screen is displayed. For more information about fulfillment summary details of a return item, see [Section 2.10.6, "Viewing or Modifying Fulfillment Summary"](#).
- f. Click Next.
- g. If there are order lines with fulfillment method as Pick Up, the Change Service Appointment screen is displayed. For more information about creating an appointment, see [Section 2.10.11, "Modifying Service Appointments"](#).
- h. If there are no order lines that need to be picked up, the Order Summary screen is displayed.

In the available options panel: Select Create Refund for All Items option, to refund for all the items.

- a. Click Next. The Identify Items screen is displayed. In the Identify items that were shipped incorrectly panel, enter the Item ID or click the search icon. The Item Search screen is displayed. Enter the appropriate search criteria and click Search. The search results are displayed in the Item List panel. Select the appropriate item and click Select.
- b. If you do not know the item ID, select the Could Not Identify Item option. Enter the quantity of the item, and enter the item description in the Item description panel.
- c. To report another extra item, click the Add Another Item button and enter the appropriate details.
- d. In the Important Notes panel, you can view any additional information entered for the order. For more information about viewing or adding notes to an order see, [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).
- e. Click Next. The Report Extra Items: Fulfillment Summary screen is displayed. For more information about fulfillment summary details

of a return item, see [Section 2.10.6, "Viewing or Modifying Fulfillment Summary"](#).

- f. Click Next.
- g. If there are order lines with fulfillment method as Pick Up, the Change Service Appointment screen is displayed. For more information about creating an appointment, see [Section 2.10.11, "Modifying Service Appointments"](#).
 - If there are no order lines that need to be picked up, the Return: Payment Confirmation screen is displayed. For more information about viewing and confirming return order payment details, see [Section 2.10.7, "Viewing or Modifying the Payment Summary"](#).

2.10.14 Reporting Unexpected Items

Sometimes a customer may report that he did not order items that he received. In such situations you may need to create a customer and then create a return for the wrongly shipped items.

To report unexpected items:

1. From Tasks > Return, select Report Unexpected Items. The Customer Identification screen is displayed.
2. To search for an existing customer, enter the appropriate details in the Find Existing Customer panel and click Search. The search results are displayed in the Results panel. Select the customer record and click Next.
3. If the customer does not exist, you need to create a new customer. To create a new customer:
 - Click Create Consumer to create a consumer customer.
 - Click Create Business to create a business customer.Enter the appropriate details and click Next.
4. The Report Extra Items: Identify Items screen is displayed.
5. In the 'Identify items that were shipped incorrectly' panel, enter the Item ID or click the search icon. The Item Search screen is displayed. Enter the appropriate search criteria and click Search. The search results are displayed in the Item List panel. Select the appropriate item and click Select.

6. If you do not know the item ID, select the Could Not Identify Item option. Enter the quantity of the item, and enter the item description in the Item description panel.
7. To report another extra item, click the Add Another Item button and enter the appropriate details.
8. In the Important Notes panel, you can view any additional information entered for the order. For more information about viewing or adding notes to an order see, [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).
9. Click Next. The Report Extra Items: Fulfillment Summary screen is displayed. For more information about fulfillment summary details of a return item, see [Section 2.10.6, "Viewing or Modifying Fulfillment Summary"](#).
10. Click Next.
 - If there are order lines with fulfillment method as Pick Up, the Service Fulfillment Summary screen is displayed. For more information about creating an appointment, see [Section 2.10.11, "Modifying Service Appointments"](#).
 - If there are no order lines that need to be picked up, the Return Order Summary screen is displayed.

2.10.15 Canceling a Return Order

A customer may want to cancel some of the items or the entire return order. The customer may also want to cancel the exchange order corresponding to the return order. To cancel a return order, you must search for a return order. For more information about searching for a return order, see [Section 2.1.5, "Performing an Advanced Return Order Search"](#).

1. From Tasks > Return, select Cancel Return Order. The Cancel Return Order screen is displayed.
2. In the Cancel Return Order panel, select the reason code from the drop-down list.
 - If you want to cancel all the items, select the Select All Available Quantity for Cancellation option.

- If you want to cancel only some of the items included in the order, select the Select Specific Quantity for Cancellation option. Select the lines that you want to cancel and enter the quantity for cancellation.

Note: If the status modification rules do not allow you to cancel an order line, then the order line is disabled.

Note: If you attempt to cancel a line for which an invoice has been created, the Sterling Call Center and Sterling Store application displays an error, and does not allow you to cancel the line.

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

3. In the Important Notes panel, you can view any additional information entered for the order. For more information about viewing or adding notes see, [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).
4. Click Confirm.
 - If there is an exchange order created for the return order, the Cancel Return Order: Cancel Exchange Order screen is displayed. In the Cancel Exchange Order panel, select the reason code from the drop-down list.
 - a. If you do not want to cancel any exchange order, select the Cancellation of Exchange Order not required option.
 - b. If you want to cancel all the items, select the Select All Available Quantity for Cancellation option.
 - c. If you want to cancel only some of the items included in the order, select the Select Specific Quantity for Cancellation option. Select

the lines that you want to cancel and enter the quantity for cancellation. Click Confirm.


Note: When you cancel a bundle item, all the component quantity will be cancelled in the same ratio defined while configuring bundles.

Note: When you revisit the Cancel Return Order screen and items are available for cancellation, the message "The previous cancellation request has been executed. Select 'Proceed Without Cancellation' to continue without anymore cancellations" is displayed.

If no items are available for cancellation, the message "No items on this order are available for cancellation" is displayed.

2.10.16 Creating an Exchange Order

A customer may want exchange items to be created for the items that are being returned. In such situations, you need to create an exchange order for the corresponding return order. To create an exchange order, you must search for the return order. For more information about searching for a return order, see [Section 2.1.5, "Performing an Advanced Return Order Search"](#).

1. From Tasks > Return, select Create Exchange Order. The Create Exchange : Add Items screen is displayed. In the Item column, enter the identifier of the item or item description, or choose the  to select an item from the Item List. You can also click the Add More Lines hyperlink. For more information about performing an advanced item search, see [Section 2.1.3.4, "Performing an Advanced Item Search"](#).
2. Click Next. The Create Exchange : Change Fulfillment Options screen is displayed. For more information about changing the fulfillment method, see [Section 2.5.1, "Modifying Fulfillment Options"](#).
3. Click Next. The Create Exchange : Fulfillment Summary screen is displayed. For more information about viewing the fulfillment summary, see [Section 2.5.2, "Fulfillment Summary"](#).

4. Click Next.
 - If order lines are being delivered on this order, the Service Appointment screen is displayed where you can create an appointment. For more information about creating an appointment, see [Section 2.10.11, "Modifying Service Appointments"](#).
 - If there are no order lines to be delivered, the Confirm Payment screen is displayed. For more information about viewing payment information, see [Section 2.10.7, "Viewing or Modifying the Payment Summary"](#).
 - If you are not required to enter the payment information, the Return Order Summary screen is displayed. For more information about viewing the return order summary, see [Section 2.1.5.1, "Viewing Return Order Summary"](#).

2.10.17 Changing Return Method

Sometimes a customer may want to change the fulfillment method of a return order. To change the return method, you must search for the return order. For more information about searching for a return order, see [Section 2.1.5, "Performing an Advanced Return Order Search"](#).

To change the return method:

1. From Tasks > Return, select Change Return Method. The Fulfillment Summary screen is displayed.

2.10.17.1 Return Fulfillment Method: Shipping Panel

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

1. In the Lines being shipped to panel, you can view the return items that are being shipped back.
2. You can view the details of the item such as the item ID, quantity and unit price.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its

components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

3. In the Ship To items panel, you can view the return address to which the item will be shipped.
4. To change the fulfillment method to Pick Up, select the lines and click Change To Pick Up. The selected item is moved to the Return Pick Up Summary panel.

Note: The Change to Pick Up button is displayed only if the item supports Pick Up return method.

5. Click Next.
 - If any order lines are being delivered and the newly added lines require a new appointment or a changed appointment, the Change Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about viewing the service fulfillment summary, see [Section 2.5.6, "Service Fulfillment Summary"](#).
6. To allow the customer to keep an item, select the line and click the Customer Can Keep button. The selected item is moved to the Keep These Items panel.

2.10.17.2 Return Fulfillment Method: Pick Up Panel

You can view the return fulfillment summary for the "Pick Up" fulfillment method.

1. In the Lines being picked up from panel, you can view the return items that are being picked up.
2. You can view the details of the item such as the item ID, quantity and unit price.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

3. In the Pick up items from panel, you can view the address from which the items will be picked up.
4. To change the address from which the items are being picked up, select the lines and click the Change Address button. The Add a New Address pop-up window is displayed. Enter the appropriate details and click Confirm.
5. Click Next.
 - If any order lines are being delivered and the newly added lines require a new appointment or a changed appointment, the Change Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about viewing the service fulfillment summary, see [Section 2.5.6, "Service Fulfillment Summary"](#).
6. To change the fulfillment method to shipping, select the lines and click the Change To Shipping button. The selected item is moved to the Return Shipment Summary panel.
7. To allow the customer to keep the items, select the lines and click the Customer Can Keep button. The selected item is moved to the Keep These Items panel.

2.10.17.3 Keep These Items Panel

You can view the details of the items that the customer can keep.

1. In the Keep these items with our compliments panel, you can view the details of the items, such as the item ID, description, quantity, and unit price.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).


2. Click Change To Shipping to ship the item back. The selected item is moved to the Return Shipment Summary panel.
3. Click Change To Pick Up for the item to be picked up. The selected item is moved to the Return Pick Up Summary panel.
 - If any order lines are being delivered and the newly added lines require a new appointment or a changed appointment, the Change Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about viewing the service fulfillment summary, see [Section 2.5.6, "Service Fulfillment Summary"](#).

Note: The Change to Pick Up, Change to Shipping buttons are displayed only if the item supports Pick Up, shipping return methods.

2.10.17.4 Exchange Fulfillment Method—Shipping Panel

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

- The address to which the item is shipping is displayed in the header panel, if the fulfillment method is "Shipping".

- The  icon indicates that the item is a gift and can be picked up or shipped to the gift recipient. For more information about setting up gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- The open box icon indicates that the item is an open-box item. For more information about open-box items, see [Section 3.3.9, "Adding Open Box Items"](#).
- The item image displays an image of the actual item.
- The item description and the item identifier display.
- The Quantity column displays the order line quantity.
- The Unit Price column displays the item price for one unit.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

- The Available column displays the latest date on which the product is available. If items are unavailable, the column is displayed in red, indicating unavailability.
- The Level of Service column enables you to change the carrier service with cost from the drop-down list.

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

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

- Cancel

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

Note: When the parent bundle line is cancelled, all the components lines are automatically cancelled.

When the action is changed from Shipping to 'Change to Pick Up', the screen returns to the Change Fulfillment Options screen and the system automatically checks the box against each modified order line. For more information about the fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#).

- Click the Gift Options button to modify the gift options for the selected items. You must check the box for the item for which you want to add or clear the gift information. For more information about gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- Click 'Go to the Change Fulfillment Options' if you want to make changes to the fulfillment methods. For more information about changing fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#).



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

- Click Confirm or Next. All items in the order line are reserved.
- If any exchange lines are being delivered and the newly added lines require a new or changed appointment, the Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).

- Click Next. The Confirm Payment screen is displayed where you can view the payment details for an order. For more information about payment confirmation, see [Section 2.10.7, "Viewing or Modifying the Payment Summary"](#).


2.10.17.5 Exchange Fulfillment Method—Pick Up Panel

You can view the fulfillment summary for the "Pick Up" fulfillment method.

- If the fulfillment method is "Pick Up", the ship node is displayed.
- The  icon indicates that the item is a gift and can be picked up by the recipient. For more information about setting up the gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- The  icon indicates that the item is an open box. For more information about open-box items, see [Section 3.3.9, "Adding Open Box Items"](#).
- The item image displays an image of the actual item.
- The item description and the item identifier display.
- The Quantity column displays the item quantity.
- The Unit Price column displays the item price for one unit.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

- The Preferred column displays the date on which the customer prefers to pick up the item. Click the  icon to modify the preferred date for picking up the item. The calendar displays the dates from the initial product ship date. If the product ship date is blank, the calendar does not display any dates.
- The Available column displays the latest date when the product is available in the ship node.

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

When the action changes from Pick Up to 'Change to Shipping', the screen returns to the Change Fulfillment Options screen and the system automatically checks the box against each modified order line. For more information about modifying the fulfillment options, see [Section 2.5.1, "Modifying Fulfillment Options"](#)

- Click the Gift Options button to modify the gift options for the selected item. You must check the box for the item for which you want to add or clear the gift information. For more information about setting up gift options, see [Section 2.7.1, "Setting Up Gift Options"](#).
- Click the Change Store Location button to select the store from where you want to pick up the items. You must check the box of the item you want to pick up from an alternate store. For more information about alternate pick up locations or stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
- Click 'Go to Change Fulfillment Options' if you want to make changes to the fulfillment method. For more information about the fulfillment options screen, see [Section 2.5.1, "Modifying Fulfillment Options"](#).
- Click Next. All items in the order line are reserved.
- If a work order or delivery service is required, the Service Appointment screen is displayed. For more information about creating or modifying an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
- Click Next. The Confirm Payment screen is displayed where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.10.7, "Viewing or Modifying the Payment Summary"](#).

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

Note: After you first visit the Fulfillment Summary screen, if you then make changes elsewhere in the Return Order wizard and revisit the Fulfillment Summary screen, it may not contain changes from your original visit. The Fulfillment Summary screen always chooses options based on the configuration that is set by your enterprise. To help you remember this, a warning message is displayed on the second and subsequent visits to the Fulfillment Summary screen reminding you to review the information carefully on this screen and ensure that options you previously set are still in effect. You can reset these options, if necessary.

After you have finished with the Fulfillment Summary, click Next to view the Payment Return Order Payment Summary. See [Section 2.10.7, "Viewing or Modifying the Payment Summary"](#) for more information.

2.11 Performing Alert and Queue Management Tasks

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

The alert and queue management tasks include:

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

- [Viewing the Next Alert](#)
- [Resolving Alerts](#)
- [Closing Alerts](#)

2.11.1 Creating Alerts

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

To create an alert:

1. From Tasks > Alerts, select Create Alert. The Create Alert screen is displayed.
2. From the Enterprise drop-down list, select the enterprise for which you want to create the alert.
3. From the Alert Type drop-down list, select the appropriate alert type.
4. In the User field, enter the appropriate user identifier.
If you do not know the user's identifier, click the Find User hyperlink. The Find User screen is displayed. For more information about searching for a user, see [Section 2.11.1.1, "Searching for a User"](#).
5. In the Priority field, enter the priority for the alert.
6. In the Queue field, select the queue from the drop-down list to assign it to an alert.
7. If you need to create a follow-up date for the alert, enter an appropriate date in the Follow-up Date field.
8. In the Associated Order field, enter the order number associated with the alert.
9. To search for the order, click the Find Order hyperlink. The Order Search screen is displayed. For more information about searching for an order, see [Section 2.1, "Performing Search Tasks"](#).
10. In the Details panel, enter the appropriate alert details.
11. Click Create.

2.11.1.1 Searching for a User

To search for a user:

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

2.11.2 Viewing Alert Information

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

To view the alert information:

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

The tree structure contains one or more of the following:

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

2.11.3 Searching for Alerts

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

To search for an alert:

1. From Tasks > Alerts, select Alert Search. The Alert Search screen is displayed.
2. Enter the appropriate search criteria.
3. Click Search. You can view the alert details.
4. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

2.11.3.1 Viewing Alert Details

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

- If only one alert matches your search criteria, the Alert Details screen is displayed where you can view the detailed information about the alert.
- If there are multiple alerts that match your search criteria, a list of alerts is displayed. Double-click the appropriate alert. The Alert Details screen is displayed. You can view the appropriate alert details depending on the type of alert.

- If you want to change the status of the alert, select the appropriate alert status from the Alert Status drop-down list and click Save.
- If you want to modify the follow-up date for the alert, enter the appropriate date in the Follow-up Date field and click Save.
- In the Notes panel, you can view any additional information about the alert.
- If you want to enter notes regarding alerts, click on the Add Note hyperlink. The Add Notes for the Alert screen is displayed.


To add notes:


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

2.11.4 Notifying Users of Assigned Alerts

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

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

- The number of open alerts is displayed in the CSR message panel as an  (alerts) icon. Click on the number of open alerts.
 - The number of open alerts assigned to the current user is displayed, if configured for the user.
 - The number of priority 1 alerts is displayed, if configured to display alerts for queues to which the current user is subscribed.

Note: The number adjacent to the  (alerts) icon is refreshed regularly based on the polling time configured.

Upon clicking the number of open alerts, if there is only one open alert, the View Alert Details screen is displayed. Otherwise, the Alert Search and List screen is displayed. For more information about viewing alerts, see [Section 2.11.2, "Viewing Alert Information"](#). For more information about searching for alerts, see [Section 2.11.3, "Searching for Alerts"](#).

- Based on the polling time configuration, a window pops up with a beep. A hyperlink on the pop-up window is displayed:
 - The number of open alerts assigned to the current user, if configured for users. If there are no open alerts assigned to the current user, the follow-up alerts assigned to the user display.
 - The number of priority 1 alerts added to the queue to which the current user is subscribed, if configured to display alerts for queues.
 - Select the Do not notify box, if you do not wish to see alert notifications.

Note: The Do Not Notify check box is displayed only to users with the necessary permissions.

2.11.5 Assigning Alerts to a User

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

To assign alerts to different users:

1. Search for the alert. For more information about searching for an alert, see [Section 2.11.3, "Searching for Alerts"](#). The Alert Details screen is displayed.
2. From the Alert Details screen > Tasks > Alert, select Assign To User. The Assign To User screen is displayed.

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

3. In the Assign To User Id field, enter the appropriate identifier of the user.
If you do not know the user's identifier, click the Find User hyperlink. The Find User screen is displayed. For more information about searching for a user, see [Section 2.11.1.1, "Searching for a User"](#).
4. In the Notes panel, enter any additional notes about assigning the alert to a particular user, if applicable.
5. Click Assign.

2.11.6 Moving Alerts to a Queue

You can move a particular alert to a different queue.

To move an alert to a different queue:

1. Search for the alert. For more information about searching for an alert, see [Section 2.11.3, "Searching for Alerts"](#). The Alert Details screen is displayed.
2. From the Alert Details screen > Tasks > Alert, select Move To Queue. The Move To Queue screen is displayed.
In the Currently Assigned To Queue Id field, you can view the identifier of the queue to which the alert is currently assigned.
3. In the Assign To Queue Id field, enter the appropriate queue identifier.
4. To search for a queue, enter the appropriate information in the Queue Id Contains or the Queue Name Contains fields.
5. Click Find Queue. The list of queues matching the search criteria is displayed.
6. Double-click the appropriate queue identifier.
7. You can add any additional notes about assigning the alert to a particular queue in the Notes panel, if necessary.
8. Click Assign.

2.11.7 Viewing the Next Alert

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

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

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

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

2.11.8 Resolving Alerts

Different alert types can be resolved in different ways. Some alerts can be resolved by simply closing the alert. For more information about closing an alert, see [Section 2.11.9, "Closing Alerts"](#). Some alerts, such as FTC Notification Alerts, should be resolved using other methods.

2.11.8.1 FTC Notification Alerts

The FTC Alert Details screen is used when you contact a customer to inform them of a delay or when a customer contacts the call center in response to a notification about a delay. In any event, these alerts should not be resolved without the customer's consent.

There are two ways in which you can resolve an FTC Notification:

- Accepting the delay on each line.
- Cancelling the lines that are being delayed.

2.11.8.1.1 Resolving a Single Alert

To resolve a single alert:

1. Search for the alert. For more information about searching for an alert, see [Section 2.11.3, "Searching for Alerts"](#). The Alert Details screen is displayed.
2. If the customer agrees to a delay on any of the lines, select the lines whose delay is being accepted, and click Accept Delay. The Notes pop-up window is displayed.
3. Enter the appropriate notes and click OK. The Alert Details screen is refreshed.
4. If the customer does not agree to a delay on any of the lines, select the lines whose delay is not being accepted, and click Cancel Lines. The Notes pop-up window is displayed.
5. Enter the appropriate notes and click OK. The Alert Details screen is refreshed.
6. If more lines have to be resolved, repeat [Step 2](#) through [Step 5](#) for the corresponding lines until all the lines are resolved. After all the lines are resolved the alert will also be resolved and automatically closed.

2.11.8.1.2 Resolving Multiple Alerts

If an order has multiple FTC Notification alerts open at the same time, the Alert Details screen will function a little differently.

To resolve multiple alerts:

1. Search for the alert. For more information about searching for an alert, see [Section 2.11.3, "Searching for Alerts"](#). The Alert Details screen is displayed.
2. Click the Review all FTC Alerts hyperlink. The Multi Alert Details screen is displayed.
3. Perform [Step 2](#) through [Step 6](#) explained in [Section 2.11.8.1.1, "Resolving a Single Alert"](#). You can select lines from different alerts and resolve them all at the same time. As and when individual alerts get resolved, they will be automatically closed and removed from this screen. When all the alerts have been resolved, the screen will automatically close.

2.11.8.2 Price Match Alerts

The Price Match Alert Details screen is used when a customer contacts the call center that another retailer is selling the same items that were ordered at a lesser price. In such situations, you may look into the customer's claims and price match the items, if necessary. If the user does not have permissions to approve the price match, an alert will be created which can be approved/denied by a user who has permissions.

To resolve a price match alert:

1. Search for the alert. For more information about searching for an alert, see [Section 2.11.3, "Searching for Alerts"](#). The Alert Details screen is displayed.
2. Click the Approve button to approve the price match.
3. Click the Deny button to reject the price match.

2.11.9 Closing Alerts

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

To close an alert:

1. Search for the alert. For more information about searching for an alert, see [Section 2.11.3, "Searching for Alerts"](#). The Alert Details screen is displayed.
2. From the Alert Details screen > Tasks > Alert, select Close Alert. The Close Alert screen is displayed. You can view the identifier of the user who closed the alert.
3. In the Notes panel, enter the appropriate notes, if applicable.
4. Click Save.


2.12 Performing Announcement Tasks

CSRs can post messages and other useful information pertaining to other CSRs, for example, information about delivery of goods to a certain region being delayed because of bad weather conditions. This information has to be conveyed to other CSRs to ensure that they are aware of the delay. Users who belong to a user group that has the necessary permissions can create, view, and cancel announcements.

2.12.1 Creating an Announcement

Using the Announcements task, you can create an announcement. However, after an announcement is created, you cannot modify the announcement but you can cancel it.

To create an announcement:

1. Perform one of the following tasks to open the Create Announcement screen:
 - From the Actions menu, select Create Announcement.
 - In Related Tasks panel, click Create Announcement.
2. From the Send To drop-down list, select the appropriate queue for which you want to create the announcement.
3. In the Expiration Date field, click the  icon and select the date until when you want the announcement to be available.

4. In the Subject field, enter a suitable title for the announcement. The length of the value should not exceed 100 characters.
5. In the Link field, specify the URLs of the corresponding Web sites, if applicable.
6. In Summary, enter additional information pertaining to the announcement, if applicable.
7. Click Announce.

2.12.2 Viewing and Canceling Announcements

An Announcements panel is provided in the Quick Access screen. Users who belong to a user group that has the necessary permission, can view the announcements. The Announcements panel displays the subject of an announcement, a brief description of the announcement, the date on which the announcement was created, the date on which the announcement expires, and a View Details hyperlink.

On clicking the View Details hyperlink of the corresponding announcement, the Announcement Details screen is displayed. This screen displays the same information that is displayed in the Announcements panel. While creating an announcement, if the user has specified the URL of a Web site, the Web site will be displayed in the Announcement Details screen. You can also view the Web site on an external browser by clicking the View in browser hyperlink.

Note: In the Announcements panel, you can view up to 200 characters of the description. If the length of the description exceeds 200 characters, you can view the remaining description in the Announcement Details screen.

If you have the permission to cancel an announcement, click the Cancel Announcement button in the Announcement Details screen to cancel an announcement.

2.13 Setting User Preferences

Sterling Call Center and Sterling Store enables you to set user preferences such as the display of alert notifications, additional help

messages, keyboard shortcuts, customer message panel, scratch pad, position of related tasks, and CSR message/customer message panel.

To set user preferences, from the View menu, select Preferences. The User Preferences pop-up window is displayed. You can set the following preferences and click Confirm to save your changes:

- Select the Display alert notifications check box, to display alert notifications. Deselecting the Display alert notifications check box will disable the pop-up window configured to display on top of the CSR message panel based on the polling time.

Note: The Display alert notification option is not displayed if the application is configured to never notify users.

- Select the Display additional help messages and icon legends check box, to display help messages. Deselecting the Display additional help messages and icon legends check box will disable the additional help messages of a screen whenever the screen is opened.
- Select the Display keyboard shortcuts for related tasks check box, to display keyboard shortcuts. Deselecting the Display keyboard shortcuts for related tasks check box will disable the keyboard shortcut display within the related task panel.
- Select the Hide customer message panel check box, to hide the customer message panel. Deselecting the Hide customer message panel check box will allow the customer message panel to show up.
- Select the Remember pagination preference check box, to remember the pagination preferences. While retrieving the records, if a sorting or filtering is applied, the message "New records are returned to a table that has been sorted or filtered. As a result, the new records are inserted into the table based on the existing sort or filter criteria. All new records are highlighted." are displayed. Clearing this check box will allow the pagination message pop-up to show up at search screens.
- In the Position of CSR message/Customer message panel, select top or bottom, to display the CSR message/Customer message panel on the top or bottom respectively.

- Under Display Scratch Pad As, select Related Task to display the scratch pad in the Related Tasks panel, or Popup to display the scratch pad in a pop-up window.
- Select the Display the scratch pad after logging in check box to display the scratch pad soon after a user logs in to the application. Clear the Display the scratch pad after logging in check box if you do not want to display the scratch pad after a user logs in to the application.
- Depending on whether you want the Related Tasks panel to be displayed on the left or right side of the screen, select Left or Right in the Position of Related Tasks view

Note: You must restart the application for some of the user preferences to take effect, such as collapsible customer message panel, position of the Related Tasks panel, and CSR Message/Customer Message panel.

2.14 Viewing the Documentation Library

Sterling Call Center and Sterling Store enables you to access the product documentation library to view all the Sterling Call Center and Sterling Store application documents. Based on the configuration, either the Online Documentation Library or the Local Documentation Library is displayed.

The Online Documentation Library provides online access to the Sterling Call Center and Sterling Store documentation in HTML and PDF formats. The combination of Google mini search capability with the HTML format enables users to search the entire documentation set and narrow their results quickly.

The Local Documentation Library provides access to the Sterling Call Center and Sterling Store documentation in HTML format, as well as index and search capability on a book-by-book basis.

You can access the product documentation library by selecting the Documentation Library option from the Help Menu.

Note: You can access the documentation library only if you belong to a user group that has the necessary permissions.

2.15 Performing Report Tasks

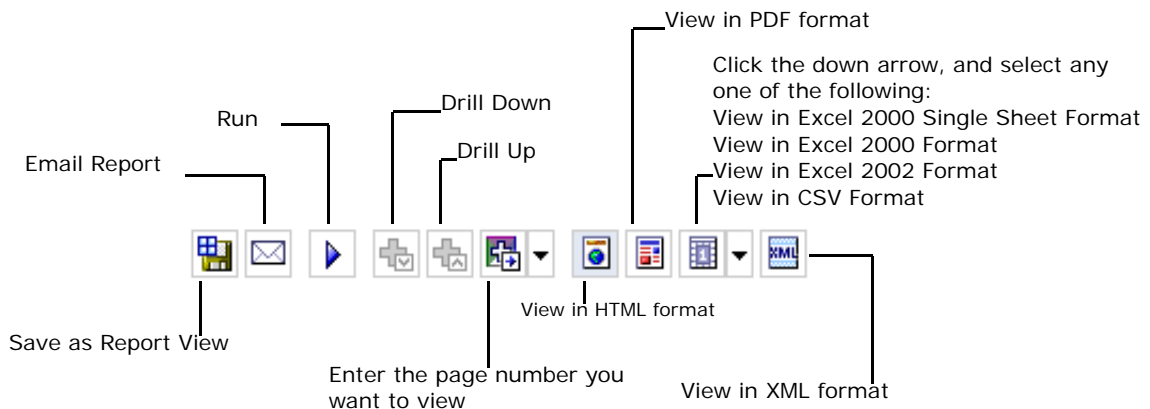
Sterling Call Center and Sterling Store provides rich functionality to generate reports such as cross sell reports, CSR reports, and price match reports.

To view reports, from Tasks > Reports, select View My Reports. The My Reports screen is displayed. Click the YCD-Analytics hyperlink. The list of reports which can be generated is displayed.

2.15.1 Cognos 8 Business Intelligence Toolbar


This section describes the Cognos 8 Business Intelligence toolbar that appears in the Sterling Call Center and Sterling Store report.

Figure 2–1 Default Cognos 8 Business Intelligence Toolbar




The Cognos 8 Business Intelligence toolbar that appears in the Sterling Call Center and Sterling Store report contains the following icons:

- View in HTML format

Click  to view the report in Hypertext Markup Language format. By default, the Sterling Call Center and Sterling Store reports are displayed in HTML format.


- View in PDF format

Click  to view the report in Portable Document Format.

- View in XML format

Click  to view the report in eXtensible Markup Language Format.

- View in Excel or CSV formats

Click  the down arrow provided next to the icon. The various Excel formats and CSV format are displayed. Click the appropriate format in which you want to view the report.

2.15.2 Cross Sell Reports

Call Center Managers and Store Managers may need information about the cross sales performance of the call center or store. This report provides information about the best cross selling items. This report also allows you to compare the average cross sell revenue per order for a given period with the previous period. [Figure 2–2](#) shows a sample Cross Sell Report.

To generate cross sell reports:

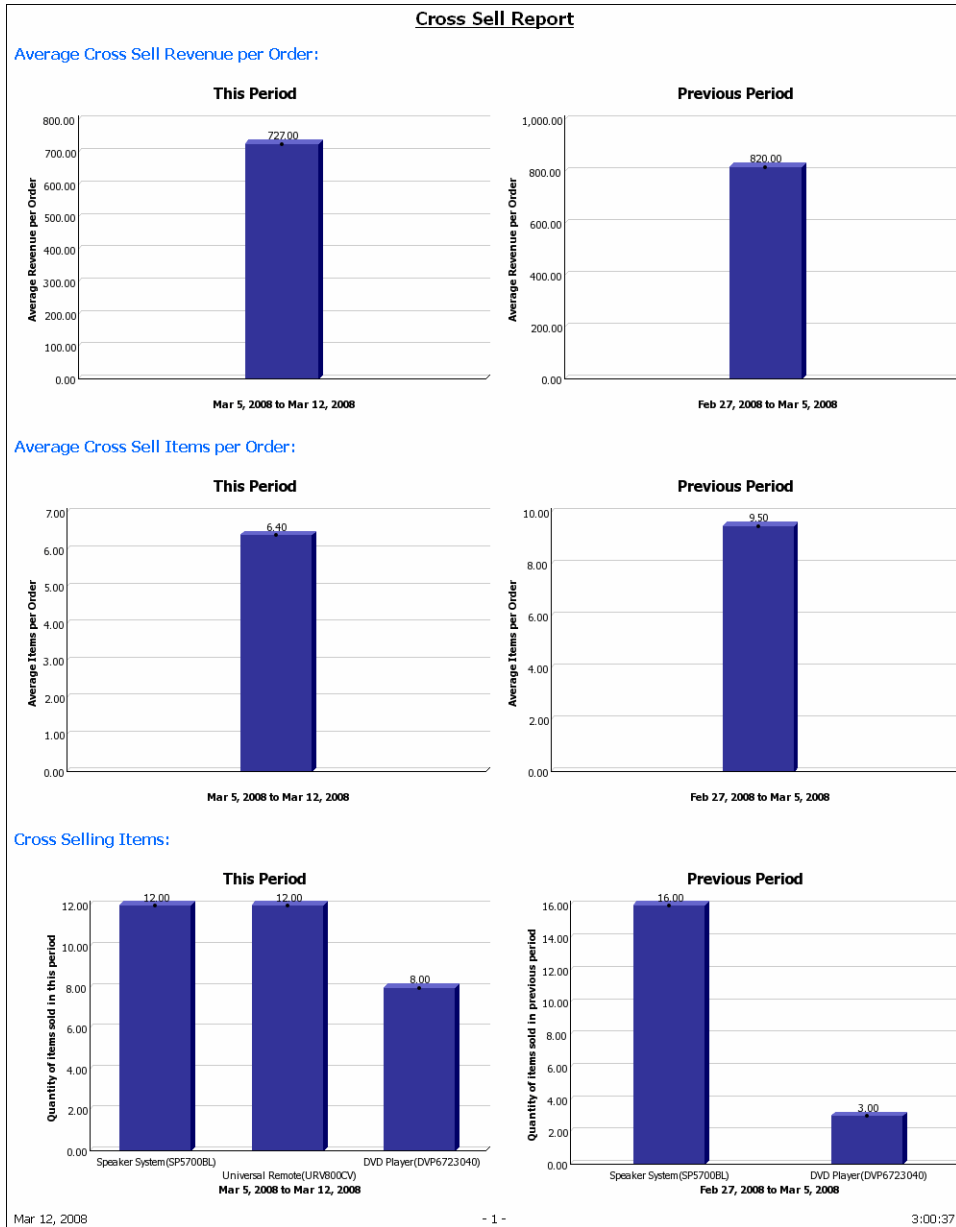
1. Click the Cross Sell Reports hyperlink. The Cross Sell Report screen is displayed.
2. Select the enterprise for which you want to view the report from the Choose the Enterprise drop-down list.
3. Select the period for which you want to view the report from the Choose the period to view the report for panel.
4. Select the start date for the period from the Choose the start date of the period panel.

Note: If you select a start date that is earlier than the current system date, the Cross Sell report is displayed for the period following the start date. However, if the start date that is selected is same as the current system date, the Cross Sell report is displayed for the period preceding the start date.

5. Click Finish. The Cross Sell Report is displayed.

For each day within a specific time period, the graph displays the average cross sell revenue per order. The second graph displays the average number of cross sell items per order. The third graph displays the number of items sold for best cross sell items. Graphs for the previous period are also displayed, adjacent to the graphs for the current period.

Figure 2–2 Cross Sell Report



2.15.3 CSR Reports

Call Center Managers and Store Managers may need to track information about the number of sales and revenue generated by a particular CSR or store associate. This report provides visibility into the number of sales, total cross sell, revenue generated, and alerts resolved during a specific period of time. [Figure 2–3](#) shows a sample CSR Report.

To generate CSR reports:


1. Click the CSR Reports hyperlink. The CSR Report screen is displayed.
2. Select the enterprise for which you want to view the report from the Choose the Enterprise drop-down list.
3. Select the Start and End date for which you want to generate the report. To select a date, click the  icon and then select the year, month, and day.
4. Click Finish. The CSR Report is displayed. You can view the following details:
 - CSR—The name of the CSR.
 - Number Of Orders Placed—The number of orders created by the CSR.
 - Revenue From Orders—Total revenue from the orders created by the CSR.
 - Average Items Per Order—The average items per order for all the orders created by the CSR.
 - Average Revenue Per Order—The average revenue per order for all the orders created by the CSR.
 - Total Cross Sell Revenue—Total cross sell revenue from the orders created by the CSR.
 - Average Cross Sell Items Per Order—The average cross sell items per order for all the orders created by the CSR.
 - Number Of Alerts Resolved—The number of alerts resolved by the CSR.

Figure 2–3 CSR Report

<u>CSR Report</u>							
Date range chosen				Between Jun 18, 2009 and Jul 1, 2009			
CSR	Number Of Orders Placed	Revenue From Orders	Average Items Per Order	Average Revenue Per Order	Total Cross Sell Revenue	Average Cross Sell Items Per Order	Number Of Alerts Resolved
csrlead-XYZ	9	\$3,828.19	3.00	\$425.35	\$1,354.75	0.33	0


2.15.4 Price Match Reports

Pricing Analysts and Product Managers may need information about the items that are frequently price matched, competitor against who the items are frequently priced matched etc. This report helps in making decisions such as:

- If a large number of items are price matched against a particular competitor, verify if there is a sale or if the competitor is a discount retailer and exclude the competitor from the price match list.
- If an item has been price matched frequently, then the pricing analyst may need to re-price the item. If an item is not price matched, then the pricing analyst may want to re-price the item at a higher price.

Figure 2–4 shows a sample Price Match Report.

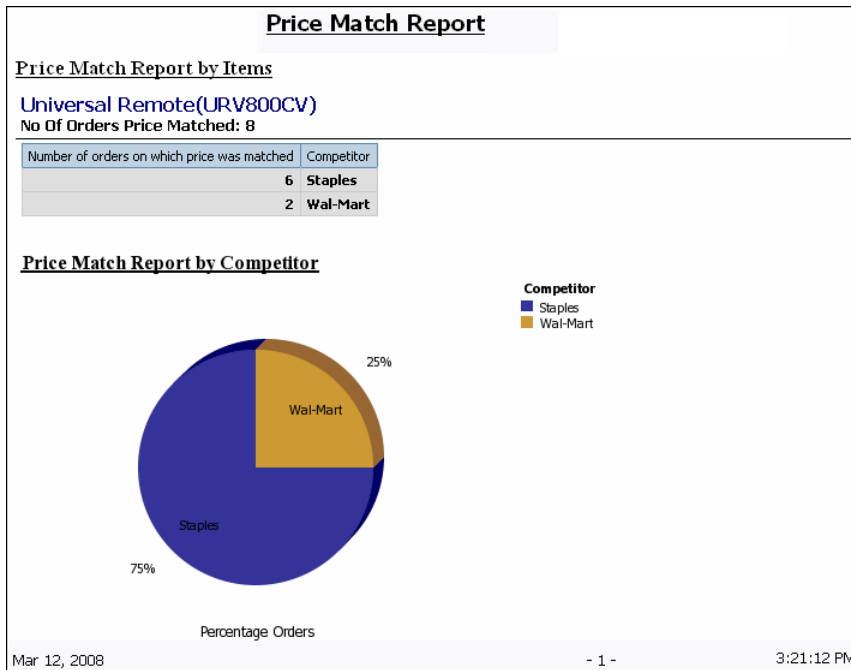
To generate price match reports:

1. Click the Price Match Report hyperlink. The Price Match Report screen is displayed.
2. Select the enterprise for which you want to view the report from the Choose the Enterprise drop-down list.
3. Select the Start and End date for which you want to generate the report. To select a date, click the  icon and then select the year, month, and day.
4. To view the price match report for a particular item, enter one or more keywords and click the Search button. Click the Options hyperlink to restrict the search criteria. The search results are displayed in the Results panel. Select the items for which you want to generate a report and click the Insert button. The item is added to the Choices panel. To remove an item, select the item in the Choices panel and click the Remove button.

5. Click Finish. The Price Match Report is displayed.

For each item, you can view the number of orders for which price match was performed. You can also view the numbers of orders for each competitor against whom the price match was performed. The graph displays the price match percentage for each competitor.

Figure 2–4 Price Match Report



2.16 Launching the IBM Sterling Business Center Application

Sterling Call Center and Sterling Store enables you to launch the IBM® Sterling Business Center application from within the Sterling Call Center and Sterling Store application. Sterling Business Center provides you with access to item and pricing configurations. For example, you may have to configure the pricing rules for an organization, or you may have to configure catalog entitlements.

You can launch Sterling Business Center from Sterling Call Center and Sterling Store only if you belong to a Sterling Call Center and Sterling Store user group that has the necessary permissions to access Sterling Business Center.

You can launch Sterling Business Center from the Quick Access screen of Sterling Call Center and Sterling Store. Navigate to Tasks, and select Sterling Business Center. The Sterling Business Center home page is displayed.

Note: By default, the Related Tasks panel is hidden when Sterling Business Center is launched. To display the Related Tasks panel, click the Maximize icon that is located at the top right of the Sterling Business Center home page. To restore the original view of the Sterling Business Center home page, click the Restore icon.

For information about configuring items and pricing in Sterling Business Center, see the *Sterling Business Center: Pricing Administration Guide* and the *Sterling Business Center: Item Administration Guide*.

Tasks for a Store Representative

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

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

A store representative may frequently be:

- [Performing Search Tasks](#)
- [Answering Frequent Queries](#)
- [Performing Order Tasks](#)
- [Performing Opportunity and Quote Tasks](#)
- [Performing Fulfillment Tasks](#)
- [Performing Price Match Tasks](#)
- [Performing Other Tasks on an Order](#)
- [Performing Customer Tasks](#)
- [Performing User Management Tasks](#)
- [Performing Return Order Tasks](#)
- [Performing Order Print Tasks](#)
- [Performing Alert and Queue Management Tasks](#)
- [Performing Announcement Tasks](#)

- [Setting User Preferences](#)
- [Viewing the Documentation Library](#)
- [Performing Reports Tasks](#)
- [Performing In-Store Pick up Tasks](#)
- [User Security](#)
- [Launching the IBM Sterling Business Center](#)

3.1 Performing Search Tasks

This task assumes that you need to take some action on an existing order or item in Sterling Call Center and Sterling Store. A customer may walk into the store to inquire about the order placed at the store. Generally, the customer knows the order number or has more information to help you locate the order or item.

3.1.1 Searching for an Order

If you know the order number, telephone number, or the e-mail address of the customer, use the Quick Access screen to directly navigate to the order. For more information about searching for an order, see [Section 2.1.1, "Searching for an Order"](#).

3.1.1.1 Performing an Advanced Order Search

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

Using Sterling Call Center and Sterling Store application, you can search for existing draft orders and orders that were created in your store. Draft orders are orders in the process of being entered that have not been confirmed.

To search for draft orders:

1. To search for draft orders, enter the appropriate search criteria in the Advanced Order Search screen and check the Show only draft orders box.

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

3.1.2 Searching for a Customer

If you know the customer's e-mail address, ID, phone number or the name of the business in case of a business customer, you can use the Quick Access screen to directly navigate to the customer.

To search for a customer:

1. In the Quick Access screen, select the customer type.
2. Enter the customer's e-mail address, user ID, phone number or the name of the business in case of a business customer.
3. Click Find Customer.
 - If a single customer exists for the search criteria you entered, the Customer Details screen is displayed.
 - If multiple customers exist for the search criteria you entered, the Customer Search screen is displayed. Enter the appropriate information in the Customer Search Criteria panel. Click Search. The Customer List screen is displayed. Double-click the appropriate Customer. The Customer Details screen is displayed. For more information about viewing customer details, see [Section 3.1.2.2, "Viewing Customer Details"](#).


3.1.2.1 Performing an Advanced Customer Search

If you do not know the complete details of a customer such as the customer's id, phone number or e-mail address you can perform an Advanced Customer Search.

To perform an advanced customer search:

1. From Tasks > Search, select Advanced Customer Search.
2. Select the organization from the drop-down list.

Enter the appropriate search criteria and click Search. The search results are displayed in the Customer Search Results panel. If you

cannot find the right customer, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

3. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

4. Double-click the appropriate customer record. The Customer Details screen is displayed. For more information about viewing the customer details, see [Section 3.1.2.2, "Viewing Customer Details"](#).

3.1.2.2 Viewing Customer Details

You can view the details of consumer customers and business customers.

Viewing Consumer Customer Details

In the Customer Details screen, you can view the details of the customer such as the customer's name, ID, e-mail address, phone number, date of birth, bill to address and ship to address.

Note: The Draft Orders, Order History, Return History, Opportunities, and Quote History tabs support pagination.

- The customer's name, login ID, and status are displayed in the top panel.

Note: Login cannot be changed after it has been entered and saved.

- In the Contact Information panel, you can view the customer's e-mail address, mobile phone number, day phone number, day fax number, evening phone number, evening fax number, date of birth, spouse's date of birth, and wedding anniversary.
- In the Bill To Address panel, you can view the details of the customer's bill to address.
- In the Ship To Address panel, you can view the ship to address to which orders for this customer will be sent.
- In the Draft Orders tab, you can view all the draft orders that exist for the customer.

The Channel column indicates whether the orders were created (or last modified) in the Web or Call Center. To modify or confirm a draft order, double-click the appropriate record in the list of draft orders.

- In the Order History tab, you can view the details of previous orders created for the customer. You can filter the list of orders by hold type and status. To filter by hold type, select a hold type from the Hold Type drop-down list, and click the Search button. To filter by status, select either Open, Backordered, or Shipped, and click the Search button. You can click the View History Orders hyperlink to retrieve orders from the history table. You can click the View Recent Orders hyperlink to switch back to recent records.
- In the Return History tab, you can view the details of the return orders that were created for the customer.
- In the Opportunities tab, you can view the details of the opportunities that were created for the customer.
- In the Quote History tab, you can view details of all the quotes that were created for the customer. You can filter the list of quotes based on hold type and/or status. To filter by hold type, select a hold type from the Hold Type drop-down list, and click the Search button. To

filter by status, select either the Open, Closed, or All Quotes, and click the Search button.

- Open displays quotes that have neither been abandoned nor converted to orders.
- Closed displays quotes that have either been abandoned or converted to orders.
- All Quotes displays all the quotes that have been created for the customer up-to-date.
- In the Addresses tab, you can view the additional addresses of the customer. Address descriptions, if any, will be displayed in the shaded panels above the addresses.
- In the Payment Methods tab, you can view the details of the payment methods assigned to the customer.

Note: The Payment Methods panel is displayed based on the configuration.

- In the Important Notes panel, you can view and add additional information about the customer. For more information about viewing or adding notes, see [Section 2.8.12, "Viewing and Adding Customer Notes and Contact Notes"](#).

Viewing Business Customer Details

In the Business Customer Details screen, you can view the details of the business customer, such as the customer's name, ID, bill to address, and ship to address.

Note: The Draft Orders, Order History, Return History, Opportunities, and Quote History tabs support pagination.

- The customer's business name, customer ID, and status are displayed in the top panel. You can click on the customer's business name to access the customer's Web site, if available, which will open in the default browser.

Note: If the status of the parent business customer changes to Inactive or On Hold, the status of the business customer and business customer contacts also changes to Inactive or On Hold, as appropriate.

Note: Customer ID and Login cannot be changed after they have been entered and saved.

- In the Bill To Address panel, you can view the details of the customer's bill to address.
- In the Ship To Address panel, you can view the ship to address to which orders for the customer will be sent.
- In the Sold To Address panel, you can view the address details of the buyer.
- In the Contacts tab, you can view the list of contacts that exist for the business customer. To view details about a contact, either double-click a contact in the list, or click the View Contact Details hyperlink in the details panel.
- In the Draft Orders tab, you can view all the draft orders that exist for the customer.

The Channel column indicates whether the orders were created (or last modified) in the Web or Call Center. To modify or confirm a draft order, double-click the appropriate record in the list of draft orders.

- In the Order History tab, you can view the details of previous orders created for the customer. You can filter the list of orders by hold type and status. To filter by hold type, select a hold type from the Hold Type drop-down list, and click the Search button. To filter by status, select either Open, Backordered, or Shipped, and click the Search button. You can click the View History Orders hyperlink to retrieve orders from the history table. You can click the View Recent Orders hyperlink to switch back to recent records.
- In the Return History tab, you can view the details of the return orders that were created for the customer.

- In the Opportunities tab, you can view the details of the opportunities that were created for the customer.
- In the Quote History tab, you can view details of all the quotes that were created for the customer. You can filter the list of quotes based on hold type and/or status. To filter by hold type, select a hold type from the Hold Type drop-down list, and click the Search button. To filter by status, select either the Open, Closed, or All Quotes, and click the Search button.
 - Open displays quotes that have neither been abandoned nor converted to orders.
 - Closed displays quotes that have either been abandoned or converted to orders.
 - All Quotes displays all the quotes that have been created for the customer up-to-date.
- In the Addresses tab, you can view the additional addresses of the customer. Address descriptions, if any, will be displayed in the shaded panels above the addresses.
- In the Payment Methods tab, you can view the details of the payment methods assigned to the customer.

Note: The Payment Methods panel is displayed based on the configuration.

- In the Child Customers tab, you can view the list of child customers belonging to the current customer. To view a child customer's details, double-click the child customer. To view the parent customer's details, click the Parent Customer hyperlink.
- In the Important Notes panel, you can view and add additional information about the customer. For more information about viewing or adding notes, see [Section 2.8.12, "Viewing and Adding Customer Notes and Contact Notes"](#).

3.1.2.3 Viewing Customer Contact Details

You can view the consumer contact details directly from the Consumer Details screen.

To view the contact details pertaining to a business customer, double-click a contact in the Contacts list of the Business Customer Details screen or click the View Contact Details hyperlink in the contact information display panel. The Contact Details screen is displayed.

In the Contact Details screen, you can view the following details pertaining to the customer contact, such as the contact's name, ID, bill to address, and ship to address:

- The contact's name, ID, and status are displayed in the top panel.
- In the Contact Information panel, you can view the contact's e-mail address, day phone number, evening phone number, day fax number, evening fax number, mobile phone number, job title, department, date of birth, spouse's date of birth, wedding anniversary, and spending limit.
- In the Bill To Address panel, you can view the details of the contact's bill to address.
- In the Ship To Address panel, you can view the details of the contact's ship to address.
- In the Sold To Address panel, you can view the details of the contact's sold to address.
- The panel below the address panels displays information about the approving user and backup approver.

An approving user can approve an order for a contact who has exceeded his or her spending limit. A backup approver can approve orders for the contact if the contact is unavailable.


- In the Important Notes panel, you can view and add additional information about the customer contact. For more information about viewing or adding notes, see [Section 2.8.12, "Viewing and Adding Customer Notes and Contact Notes"](#).

3.1.3 Searching for an Item

If you know the identifier, description, or the manufacturer's name of the item you are searching for, you can use the Quick Access screen to directly navigate to the item. You can also search for items based on specification.

To search for an item:

1. In the Quick Access screen, enter the complete identifier for the item, partial description of the item, or the complete name of the item manufacturer.
2. Click Find Item.
 - If a single item exists that matches your search criteria, the Item Detail screen is displayed.
 - If multiple items exist that match your search criteria, the Item Search screen is displayed with a list of product items.

If the search criteria does not match with any item, the Advanced Item Search screen is displayed. Click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task. Based on the configuration, either the Search Through All Items panel or the Search Items Currently Being Sold panel is displayed in the Advanced Item Search screen. If the Advanced Item Search screen is configured to allow the both the panels, the Search Through All Items panel is displayed and a Switch To Search Through All Items hyperlink is displayed which will allow you to switch between both the panels.

Search Through All Items Panel

In the Search Through All Items panel, you can search for items using the identifier of the item or the alternate identifier, description of the item, or the manufacturer's name of the pertinent item.

Search Items Currently Being Sold Panel

In the Search Items Currently Being Sold panel, you can search for items based on the enterprise. Select an enterprise from the Enterprise drop-down list. You can enter a search criteria for the item, specify a price range, and also search for items based on entitlements.

You can search for the items using the Bar Code scanning. When the store representative scans any item using the barcode scanner, the UPC code is populated in the Item Id field. Using this information, the store representative can search for more details about the item.

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

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

3.1.3.1 Viewing the Product Item Details

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

1. In the Availability panel, you can view the quantity of the item available at the store. You can also view information whether the item is available for Delivery or Pick Up. If pick up is allowed for an item, the pick up date is displayed.

Note: The availability of the bundle parent item depends on the availability of the bundle component items.

2. If the customer wants to view the availability of the item at other stores, click the View Nearby Stores For Availability hyperlink. The Details of Near-By Stores screen is displayed.
 - a. Enter the postal code of the area from where you need the item.
 - b. Click Search. You can view a list of all stores where the item is available. You can also view the store address and the approximate distance of the store from the current location.
3. In the Promotions panel, you can view all promotions associated with the item. For more information about promotions, click the hyperlink in the Short Description column.
4. If the customer wants to create an order for the selected item, click Create Order.
5. If you want to view more details about the item, click More Details. The More Details of Selected Item screen is displayed.
6. If you are viewing the details of a model item, the View Style Items hyperlink is displayed. Click this hyperlink to select an item's style. For more information about selecting an item's style, see [Section 3.3.1.3, "Selecting an Item's Style"](#).

7. If the Sterling Call Center and Sterling Store application is configured to display the URL of a product Web page pertaining to an item, the View Product Web Page hyperlink is displayed. Click the View Product Web Page hyperlink to view the Web site providing details of the item.
8. If you want to add the item to the order, click Add to Order.

3.1.3.2 Viewing the Service Item Details

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

To view the details of a service item:

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

3.1.3.3 Viewing More Details of the Selected Product Items

You can view more details of the selected product items.

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

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

3.1.3.4 Performing an Advanced Item Search


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

To perform an advanced item search:

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

In the Item List panel, you can view the item ID, description, available quantity, and the unit price of all items.
2. Select an item in the Item List panel to view more information about the item in the Item Details panel.
 - If you select a product, you can view the identifier of the item, item's description, unit of measure, availability, and unit price.

- If you select an independent service, you can view the identifier of the item, item's description, unit of measure, and unit price.

If you cannot find the items that you are searching for, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

3. Choose any one of the following and click Search:
 - Products—Provides a list of items
 - Independent Services—Provides a list of services
 - Both—Provides a list of items and services
4. If you are unable to find the pertinent items, click Show Search Criteria to enter more restrictive search criteria.
5. If you select a model item and click the Add to Order button, the Style Items pop-up window is displayed. For more information about selecting an items style, see [Section 3.3.1.3, "Selecting an Item's Style"](#).
6. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed.


The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

7. Double-click on the required item to view the item details.

3.1.4 Viewing Order Summary

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

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

For more information about viewing the summary of an order, see [Section 2.1.4, "Viewing Order Summary"](#).

3.1.4.1 Viewing the Order Line Summary

To view the order line summary, from the Order Summary screen, right-click on an order line and select View Line Summary. The Line Summary screen is displayed. For more information about viewing the order line summary, see [Section 2.1.4.1, "Viewing the Order Line Summary"](#).

In the Important Notes panel you can view any important notes that are added on that order line. To add notes to that order line, click the View/Add Notes hyperlink. The Order Line Notes screen is displayed. For more information about adding order line notes, see [Section 3.3.12, "Adding Notes to an Order"](#).


3.1.5 Performing an Advanced Return Order Search

Using additional options, you can make your return order search more precise and view more details of the return such as the return order number, original order number, customer ID.

To perform an advanced return search:

1. From Tasks > Search, select Advanced Return Search. The Return Search screen is displayed.

In the Return Order Search Criteria panel, enter the appropriate search criteria. Select an option from the Order By drop-down list based on which the records will be sorted. Select Ascending or Descending from the adjacent drop-down list and click Search. The search results are displayed in the Recent Return Order List panel. If



you cannot find the pertinent order number, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

2. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed. Click the View History Records hyperlink to retrieve return orders from the history table. You can click the View Recent Records hyperlink to switch back to recent records. The total number of records displayed in a single page is based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.
3. Double-click the appropriate order number. The Return Order Summary screen is displayed. For more information about viewing the return order summary details, see [Section 3.1.5.1, "Viewing Return Order Summary"](#).

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

3.1.5.1 Viewing Return Order Summary

In the Return Order Summary screen, you can view the details of a return order such as the primary details of the return order, refund to address, return from address, details of the corresponding exchange order.

1. In the Primary Details panel, you can view the return order number, order status, return order date, total refund amount, channel through which the items will be returned. If the order or any of the order lines are on hold, the  icon is displayed. To view and resolve holds, click the  icon. For more information about resolving order holds, see

[Section 3.3.5, "Removing Holds"](#). The provided service line is displayed as a service line.

2. In the Refund To panel, you can view the details of the customers address.
3. In the Return From panel, you can view the address from where the items are being returned.
4. In the Exchange Order Details panel, you can view the details of the exchange order such as the exchange order number, status, total exchange amount and the exchange type.
5. In the Order Lines panel, you can view the original order number, item ID, unit price, quantity, return method and status of each line.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.


To track the item, right-click on the item and select Track This Item. For more information about tracking an item, see [Section 3.3.11, "Tracking an Item or Inquiring About a Shipment"](#).

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

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

3.1.5.2 Viewing the Return Order Line Summary

To view the return order line summary or provided service line information, right-click the corresponding return order line in the Return Order Summary screen, and select View Line Summary. The Line Summary screen is displayed. The following information is displayed in this screen:

- Primary Details—This panel displays the line number, item identifiers, item description, service, status, display status, quantity, and the unit price of an item. The  icon is displayed if the order line is on hold.

This panel also indicates if the item is an open box or a gift item or both. The other details displayed in the screen are:

- If the fulfillment method is Delivery or Shipping, the ship node is displayed.
- If the fulfillment method is Pick Up, the store is displayed. Clicking the store hyperlink displays the Store Details window.

Note: To display item aliases in the Line Summary screen, configure the Item Alias to Use for the Alternate Item ID rule. For more information about configuring the rules for alternate item identifiers, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

- If the Sterling Call Center and Sterling Store application is configured to display the URL of a product Web page pertaining to an item, the View Product Web Page hyperlink is displayed. Click the View Product Web Page hyperlink to view the Web site providing details of the item.
- The gift message is displayed if the user has included a message for the gift item.
- Ship To Address—You can view the ship to address for a return order line in this panel.
- Components—You can view the bundle component details such as bundle component items, item's description, status, and the component quantity in this panel.

Note: The Components panel is displayed only when you are viewing the return order line summary of bundle items.

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

on this line" is displayed. The  icon is displayed if a stop delivery request has been placed.

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

3.1.6 Searching for an Opportunity

You can search and view the details of an opportunity. You may sometimes want to see the details of an opportunity, such as the opportunity status, the date on which the opportunity is expected to be closed, the notes added to the opportunity, and so on. For more information about searching for an opportunity, see [Section 2.1.6, "Searching for an Opportunity"](#).

3.1.7 Searching for a Quote

You may sometimes want to view a quote's summary, such as the quote's status, the items added to the quote, and so on. For example, if a user presents a quote to a customer, and if the customer neither accepts nor rejects the quote for a considerable period of time, the user may want to know the quote's expiration date so that the user can follow it up with the customer. For more information about searching for a quote, see [Section 2.1.7, "Searching for a Quote"](#).

3.2 Answering Frequent Queries

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

Customers may call you and ask:

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

3.3 Performing Order Tasks

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

- [Creating an Order](#)
- [Canceling an Order](#)
- [Viewing and Confirming the Payment Details](#)
- [Applying Hold](#)
- [Removing Holds](#)
- [Creating Store Returns](#)
- [Initiating a Return](#)
- [Adding Order Lines](#)
- [Adding Open Box Items](#)
- [Increasing Order Line Quantity](#)
- [Tracking an Item or Inquiring About a Shipment](#)
- [Adding Notes to an Order](#)
- [Adding or Modifying Charges](#)
- [Scheduling and Releasing an Order](#)
- [Viewing Procurement Orders](#)
- [Exempting an Order from Tax](#)
- [Copying a Draft Order](#)
- [Ordering Again](#)
- [E-mailing Order Information](#)
- [Transferring a Draft Order to IBM Sterling Web](#)
- [Launching the Applications Manager](#)

3.3.1 Creating an Order

This feature helps you to identify a customer and create an order for that customer. You can enter multiple order lines for an order, modify

fulfillment options and appointments, and confirm the payment information as requested by the customer.

A navigation bar is displayed at the bottom of all the screens in the order creation task flow. This helps you to clearly understand the sequence of steps you have to perform to complete the entire task. The navigation bar also enables you to revisit the previous screens, move to the next screen, or close the Order Entry screen.

When performing any of the steps in the order creation task flow, you have the option of clicking the Close button to close the Order Entry screen before confirming the corresponding order. Before the Order Entry screen closes, the Confirm pop-up window is displayed.

- If there are any changes made to the order that have not been saved, perform one of the following actions:
 - Enter a name for the order and click Save Changes to save the name and any other changes made to the order.
 - Click Discard Changes to discard the changes made to the order.
 - Click Cancel to remain on the Order Entry screen.
 - Click Delete Draft Order to delete the order.
- If you have not made any changes to the order, perform one of the following actions:
 - Enter a name for the order and click Confirm to save the draft order name.
 - Click Cancel to remain on the Order Entry screen.
 - Click Delete Draft Order to delete the draft order.

To create an order:

1. From Navigator > Order, select Create Order or from Tasks > Order, select Create Order. The Select Enterprise screen is displayed. Select the appropriate enterprise from the drop-down list.
2. Click Confirm. The Create Order: Customer Identification-Ship To Address screen is displayed.
3. Click Skip this Page if:
 - The customer intends to pick up the items at the store immediately.

- You want to capture the customer information only after confirming the inventory availability.

Note: Based on how Sterling Call Center and Sterling Store is configured, you may be able to search for customers based on their type.

4. If you have launched this task in the context of a business customer:

- To create a new contact, click the Add New Contact hyperlink. The Add Contact pop-up window is displayed. For more information about creating a new contact, see [Section 3.3.1.1, "Adding a New Contact"](#).
- Select the contact from the Select a Contact drop-down list.

Note: If the customer or contact does not have default addresses or payment methods defined, the default addresses or payment methods for the closest customer in the customer hierarchy will be used.

- The Ship To Address, Bill To Address, and Sold To Address are displayed.
- If you want to change any of the addresses, click the Change hyperlink. The Modify Address pop-up window is displayed. For more information about modifying an address, see [Section 2.3.2.3.2, "Modifying an Address"](#).
- To exempt the order from tax, perform the following actions in the Customer Options panel:
 - Select the Allow Tax Exemption check box.
 - In the Tax Exemption Code field, enter the Tax Exemption Code of the order.
 - From the Currency drop-down list, select the currency.

Note: The Currency drop-down list is displayed only when multiple currencies are defined for the customer.

5. If you have launched this task in the context of a consumer customer:
 - The Bill To Address and Ship To Address are displayed.
 - If you want to change any of the addresses, click the Change hyperlink. The Modify Address pop-up window is displayed. For more information about modifying an address, see [Section 2.3.2.3.2, "Modifying an Address"](#).
6. If this task is not launched in the context of a customer: To search for a customer: In the Find Existing Customer panel, do any of the following.
 - Enter the daytime telephone information.
 - Enter the e-mail address of the customer.
 - Enter the last name and first name of the customer.
 - Enter the last name and first few numbers of the postal code of the customer.
 - Enter the first name and first few numbers of the postal code of the customer.
7. Click Search.
 - If more than one customer is found as a result of your search, a list of customer information is displayed. Select the appropriate customer information from the list.
 - If customers are not found as a result of your search, the following message is displayed: "Your search found zero results".
 - If more than fifteen customers are found as a result of your search, the following message is displayed: "Your search resulted in more than 15 matches. Please refine your search criteria". In such situations, you need to enter more restrictive search information.

8. In the Customer Ship To Address panel, you can modify the Primary Info, Street Address, and Contact Information of the customers, if applicable.
9. If the Bill To Address of the customer is same as the Ship To Address, check the "Use As Bill To Address" box.
 - If you want to override address verification, check the Override Address Verification box.
 - If you do not want to override address verification and the address verification fails, the message "This is not a valid Address" is displayed.
10. Click Next.
 - If the status of the customer or contact is Inactive, an Invalid Customer or Contact pop-up window is displayed. The order cannot be created until the status of the customer or contact has been changed to Active.

You can change the status of a consumer customer in the Manage Contact Information screen, and you can change the status of a business customer in the Manage Customer Information screen.

Note: When the status of a parent business customer changes to Inactive or On Hold, the status of the business customer and business customer contacts also changes to Inactive or On Hold, as appropriate.

- If the Bill To address is not the same as Ship To address, the Customer Bill To Address screen is displayed. Enter the appropriate Bill To Address information.

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

- If the order already contains items and if the customer is not entitled to any of these items, an error message is displayed.

Based on the configuration, you will see one of the following screens:


- Add Items screen, with panels for each order line.
- Large Order Item Entry screen, with a table which is designed to handle large number of items.

Note: The application can be configured to either display the Large Order Item Entry screen always, or when the number of order lines exceeds a preconfigured number, or not at all.

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

Note: If the order is an existing draft order, an error message is displayed if any of the items, or the quantity of any of the items in the order fails validation.

If the application is configured to display the Add Items screen:

11. To search for an item, in the Item column, click the  icon. The Advanced Item Search screen is displayed. You can add the item to the order in one of the following ways:
 - Scan the barcode of the item or the alternate item.
 - In Item ID, enter the identifier of the item or scan the alternate item identifier.
 - If you have already added an item to the order, click the item name hyperlink. The Item Details screen is displayed. For more information about viewing the item details, see [Section 3.1.3, "Searching for an Item"](#).
 - If the item's effective date has expired and the item has an associated item that has been configured to substitute it, a




confirmation pop-up window is displayed. Click Yes to add the new item to the order.

- If the item fails validation, the following error message is displayed:



"Some of the items have errors that must be corrected. Please correct the errors in order to proceed."

Click OK. The screen is refreshed and a message is displayed in the Error panel below the order line, indicating why the order line failed validation. If it failed validation because it did not meet the minimum order quantity criteria or the maximum order quantity criteria, you can override the quantity by selecting the Override < *Minimum* or *Maximum* > order quantity validation for this item check box.

Note: The user can search for products, services or both products and services on the Advanced Item Search Screen. When searching for services or both products and services, the results display both independent and non-independent services. Non-independent services cannot be added to an order from the Item Inquiry Screens.

12. To delete a particular order line, click the  icon adjacent the corresponding order line. A confirmation pop-up window is displayed. Click Yes if you want to delete the order line. If the order line has related lines associated with it, the order line and the related lines associated with it are immediately deleted.
13. To add order line notes, click the  icon associated with the order line. For more information about adding order line notes, see [Section 2.3.4.1, "Adding Notes to an Order Line"](#).
14. You can add related product or service items to an order or you can replace the items in an order through a pop-up or a panel based on the configuration. For more information about adding related items or substituting items, see [Section 3.3.1.2, "Adding Related Items or Replacing Items"](#).
15. To view the components of a bundle item, click the View Components () button. The Bundle Components pop-up window is displayed.

You can view the details of the item, such as Item ID, Description, and Kit Quantity of the bundle components. Click Close to close the Bundle Components pop-up window. However, if the item is a configurable bundle item, perform the following tasks:


- If the item is a preconfigured bundle item, you do not have to manually configure the item. However, if you want to reconfigure the item, click the Reconfigure () button. The Product Configurator pop-up window is displayed where you can view the components of the preconfigured bundle item and reconfigure the item, if needed.
- If the item is not a preconfigured bundle item, click the Configurable Bundle () button to open the Product Configurator pop-up window and configure the item.

Note: If an item is reconfigured, the fulfillment type and pricing information defined for the item will not be available until the configuration is completed.

16. If you enter partial Item ID of a model item or a stylized item, the Style Items pop-up window is displayed. For more information about selecting an item's style, see [Section 3.3.1.3, "Selecting an Item's Style"](#). If you scan or enter the item ID of a stylized item, the stylized item is added to the order.
17. In the Quantity column, enter the required item quantity.
18. In the UOM column, select the UOM for the item from the drop-down list. If a UOM does not exist for an item or if only one UOM exists, this column is not editable.
19. In the Unit Price column, you can view the unit price and list price of the item. The prices shown are according to the Ordering UOM.

After you update the order, the unit price of the bundle item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.



For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).


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

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

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

- If you want the item to be shipped to the customer, choose Ship.
- If you want the item to be delivered to the customer's doorstep, choose Delivery.

- If the customer wants to pick up the item from the current store, choose Pick Up.
 - If the customer wants to pick up the item from an alternate store, click the Choose Stores hyperlink. The More Stores screen is displayed. Select the appropriate store from where you want to pick up the item. The selected store is displayed next to the Pick Up option. For more information about viewing inventory in other stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).
 - If the order line has already been created for pick up from a store other than the one in which the order is created, and if you want to pick up the item from the same store, choose Pick Up from (Store Name).
 - If the order line is a service line, the information indicating whether or not you can perform the service for that line is displayed.
- 22.** In the Line Total column, you can view the order line total.
- If you are adding a new item, the  icon is displayed indicating that the order needs to be updated to view the line total. If there are any special charges or discounts applied to the item, you will not be able to view those charges or discounts until you update the order. For example, if there is a 50% discount on the unit price of the item, you will not be able to view the discount until you update the order.
 - If you make changes to an item that has already been added to the order, the  icon is displayed next to the line total value, with the tooltip indicating that the order needs to be updated to view the line total.
 - The charges and discounts applied to the order line are displayed as hyperlinks. Click the charges value hyperlink to view the charges applied to the order line or click the discounts value hyperlink to view the discounts applied to the order line. If the order line has been modified so that the line total is not current, the order is updated and the Line Charges or Line Discounts pop-up window is displayed. You can view the charges or discounts applied to the order line. Click Close.
- 23.** To add more lines to the order, click the Add More Lines hyperlink.


24. To add new service lines, click the Add Independent Services hyperlink. The Item Search screen is displayed. Select the service you want to add. The service line is added and indicated by the  icon. For more information about performing an advanced item search, see [Section 3.1.3.4, "Performing an Advanced Item Search"](#)
25. To add an open box item, click the Add Open Box Item hyperlink. For more information about open box items, see [Section 3.3.9, "Adding Open Box Items"](#).
26. To view the price breakdown of the order, click the value of the Subtotal that is displayed as a hyperlink. The Order Pricing Summary pop-up window is displayed. You can view the details of the prices applied to the order, such as the order line prices, line-level price adjustments resulting from charges and discounts applied to the order lines, order total, order-level price adjustments, order-level shipping charges, and taxes on the order.
 - To view the charges and discounts applied to an order line, click the corresponding Adjustments value that is displayed as a hyperlink. The Line Charges and Discounts pop-up window is displayed. Click Close.
 - To view the charges and discounts applied to an order, click the Order Adjustments value that is displayed as a hyperlink. The Order Charges and Discounts pop-up window is displayed. Click Close.
27. To view the updated unit price and line total details, click the Update Order button. The screen is refreshed, order lines are sorted alphabetically based on the Item ID, and the updated unit prices, and the order line total are displayed.
28. Click Next. If the order contains an item that has been replaced by another item in the catalog, or if the quantity of any of the items is less than the minimum order quantity or more than the maximum order quantity that is configured for those items, the following error message is displayed:

"Some of the items have errors that must be corrected. Please correct the errors in order to proceed."



Click OK. The screen is refreshed and a message is displayed in the Error panel below the order line, indicating why the order line failed validation. If it failed validation because it did not meet the minimum



order quantity or the maximum order quantity criteria, you can override the quantity by selecting the Override < *Minimum* or *Maximum* > order quantity validation for this item check box.

If the application is configured to display the Large Order Item Entry screen:

29. To search for an item, in the Item column, click the  icon. The Advanced Item Search screen is displayed. You can add the item to the order in one of the following ways:
 - Scan the barcode of the item or the alternate item.
 - In Item ID, enter the identifier of the item or scan the alternate item identifier.
 - If you have already added an item to the order, click the item name hyperlink. The Item Details screen is displayed. For more information about viewing the item details, see [Section 3.1.3, "Searching for an Item"](#).
 - If the item's effective date has expired and the item has an associated item that has been configured to substitute it, a confirmation pop-up window is displayed. Click Yes to add the new item to the order.
 - If the item fails validation, the following error message is displayed:

"Some of the items have errors that must be corrected. Please correct the errors in order to proceed."

Click OK. The screen is refreshed, the  icon is displayed next to the order line, and an error message is displayed in the Selected Line Information panel, indicating why the order line failed validation. If it failed validation because it did not meet the minimum order quantity or the maximum order quantity criteria, you can override the quantity by selecting the Override < *Minimum* or *Maximum* > order quantity validation for this item check box.
30. To delete a particular order line, click the  icon adjacent the corresponding order line. A confirmation pop-up window is displayed. Click Yes if you want to delete the order line. If the order line has related lines associated with it, the related lines are automatically selected for deletion along with the order line.

31. To add order line notes, click the  icon associated with the order line. For more information about adding order line notes, see [Section 2.3.4.1, "Adding Notes to an Order Line"](#).
32. Click the  icon to add related product or service items to the order or to replace the items in the order. For more information about adding related items, see [Section 3.3.1.2, "Adding Related Items or Replacing Items"](#).
33. To view the components of a bundle item, click the View Components hyperlink. The Bundle Components pop-up window is displayed. You can view the details of the item, such as Item ID, Description, and Kit Quantity of the bundle components. Click Close to close the Bundle Components pop-up window. However, if the item is a configurable bundle item, perform the following tasks:
 - If the item is a preconfigured bundle item, you do not have to manually configure the item. However, if you want to reconfigure the item, click the Reconfigure hyperlink. The Product Configurator pop-up window is displayed where you can view the components of the preconfigured bundle item and reconfigure the item, if needed.
 - If the item is not a preconfigured bundle item, click the Configurable Bundle hyperlink to open the Product Configurator pop-up window and configure the item.

Note: If an item is reconfigured, the fulfillment type and pricing information defined for the item will not be available until the configuration is completed.

34. If you enter partial Item ID of a model item or a stylized item, the Style Items pop-up window is displayed. For more information about selecting an item's style, see [Section 3.3.1.3, "Selecting an Item's Style"](#). If you scan or enter the item ID of a stylized item, the stylized item is added to the order.
35. In the Quantity column, enter the required item quantity.
36. In the UOM column, select the UOM for the item from the drop-down list. If a UOM does not exist for an item or if only one UOM exists, this column is not editable.

37. In the Unit Price column, you can view the unit price of the item.

After you update the order, the unit price of the bundle item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

38. In the Fulfillment method, you can view the default fulfillment method for the item.
- If you are adding a new item, the "Update Order To View Line Total" message is displayed, indicating that the order needs to be updated to view the line total.
 - The charges and discounts applied to the order line are displayed as hyperlinks. Click the charges value hyperlink to view the charges applied to the order line or click the discounts value hyperlink to view the discounts applied to the order line. If the order line has been modified so that the line total is not current, the order is updated and the Line Charges or Line Discounts pop-up window is displayed. Click Close.
39. In the Selected Line Information panel, you can view or modify the details pertaining to the selected order line.

You can view the following details pertaining to the order line:

- Item information
- Fulfillment method and availability (only for product items)


Note: The availability details are not displayed if the user interface is not configured to do so.

Following is the list of information that the corresponding availability date displays:

- Pick Up displays the earliest date on which you can pick up the product from a store.

- Ship displays the earliest date on which you can ship the item.
- Delivery displays the earliest date on which the product is available.

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

If the fulfillment method is available for the order line, the appropriate option is enabled. If the fulfillment method is not available for the order line, the message "Not Available" is displayed along with the  icon.

- Information indicating whether you can perform the service or not (only for service items)
- Price information

You can perform the following tasks on the order line that has been selected:

- Modify Fulfillment Method
- Select Store
- Override Price
- Change or Select an item's style (only for stylized items)
- Configure or Reconfigure Items (only for bundle items)

40. To modify the fulfillment method, select the appropriate option:

- To ship the item to the customer, select Ship.
- To deliver the item to the customer's doorstep, select Delivery.
- If the customer wants to pick up the item from the current store, select Pick Up.


41. To pick up the item from a store other than the current store, click the Choose Store hyperlink. The More Stores screen is displayed. Select the appropriate store from where you want to pick up the item. The selected store is displayed next to the Pick Up option. For

more information about viewing inventory in other stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).

If the order line has already been created for pick up from a store other than the one in which the order is created, and if you want to pick up the item from the same store, select Pick Up from <Store Name>.


42. To override the price of an item, click the Override Price hyperlink. The Override Price for Item screen is displayed. To override the item price:
 - a. In Overridden Price, enter the new price of the item.
 - b. From the Reasons for Override drop-down list, select the appropriate reason.
 - c. In the Notes panel, enter any additional information, if applicable.
 - d. Click Close.
43. If the item is a stylized item, you can change the item's style or select a style for the item:
 - To change the item's style, click the Change Style hyperlink. The Style Items pop-up window is displayed. For more information about changing an item's style, see [Section 3.3.1.3, "Selecting an Item's Style"](#).
 - To select a style for the item, click the Choose Style hyperlink. The Style Items pop-up window is displayed. For more information about selecting an item's style, see [Section 3.3.1.3, "Selecting an Item's Style"](#).
44. If the item is a bundle item, you can configure or reconfigure the item:
 - To configure the item, click the Configure hyperlink. For more information about configuring an item, see the *Sterling Multi-Channel Selling Solution Administration Guide*.
 - To reconfigure an item, click the Reconfigure hyperlink. For more information about configuring an item, see the *Sterling Multi-Channel Selling Solution Administration Guide*.
45. If the item has accessories, the Accessories panel is displayed where you can view details about the accessories. To add the accessories to

the order, click Add To Order. The Accessories panel is displayed only when the order line is selected.

46. To add an open box item, click the Add Open Box Item hyperlink. For more information about open box items, see [Section 3.3.9, "Adding Open Box Items"](#).
47. To add new service lines, click the Add Independent Services hyperlink. The Item Search screen is displayed. Select the service you want to add. The service line is added and indicated by the  icon. For more information about performing an advanced item search, see [Section 3.1.3.4, "Performing an Advanced Item Search"](#).
48. To view the price breakdown of the order, click the value of the Subtotal that is displayed as a hyperlink. If the line total is not current, the order is updated and the Order Pricing Summary pop-up window is displayed. You can view the details of the prices on the order, such as the order line prices, line-level price adjustments, order total, order-level price adjustments, order-level shipping charges, and taxes on the order.
 - To view the line-level price adjustments resulting from charges and discounts applied to the order line, click the corresponding Adjustments value that is displayed as a hyperlink. The Line Charges and Discounts pop-up window is displayed. Click Close.
 - To view the order-level price adjustments resulting from charges and discounts applied to the order, click the Order Adjustments value that is displayed as a hyperlink. The Order Charges and Discounts pop-up window is displayed. Click Close.
49. To view the updated price details, click the Update Order button. The screen is refreshed, order lines are sorted alphabetically based on the item ID, updated unit prices, and order line total are displayed.
50. Click Next.

If the order contains an item that has been replaced by another item in the catalog, or if the quantity of any of the items is less than the minimum order quantity or more than the maximum order quantity that is configured for those items, the following error message is displayed:

"Some of the items have errors that must be corrected. Please correct the errors in order to proceed."

Click OK. The screen is refreshed, the  icon is displayed next to the order line, and an error message is displayed in the Selected Line Information panel, indicating why the order line failed validation. If it failed validation because it did not meet the minimum order quantity or the maximum order quantity criteria, you can override the quantity by selecting the Override <Minimum or Maximum> order quantity validation for this item check box.

51. The Create Order: Change Fulfillment Options screen is displayed. For more information about choosing a fulfillment method, selecting an appointment, and viewing payment information, see [Section 3.5.1, "Modifying Fulfillment Options"](#).
52. Click Next. The Fulfillment Summary screen is displayed. For more information about the fulfillment summary details, see [Section 3.5.2, "Fulfillment Summary"](#).

Note: The Fulfillment Summary screen is displayed only if the fulfillment method is either Shipping or Pick Up.

Note: If you have not captured the customer information, the Bill To Address screen is displayed for you to enter the billing details.

53. Click Next.
 - If order lines are being delivered on this order, the Service Appointment screen is displayed where you can create an appointment. For more information about creating an appointment, see [Section 3.5.5, "Modifying Service Appointments"](#).
 - If there are no order lines to be delivered, the Payment Confirmation screen is displayed. For more information about viewing and confirming payment details, see [Section 3.3.3, "Viewing and Confirming the Payment Details"](#).
 - If you are not required to enter the payment information, the Order Confirmation screen is displayed.

Note: The Order Confirmation screen is displayed only if you are not required to enter the payment information or if the payment methods are implemented using an external payment system. For field value descriptions, see [Table 3–1, "Order Confirmation Screen"](#).

Table 3–1 Order Confirmation Screen

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

For more information about configuring the payment options, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

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


Note: You can modify only the existing charges.

- b. Select the Charge Override Reason.
 - c. In the Notes panel, enter any additional information, if applicable. For more information about adding notes to an order, see [Section 3.3.12, "Adding Notes to an Order"](#).
 - d. Click Confirm to save the changes and return to the Payment Confirmation screen.
55. Click Confirm.

3.3.1.1 Adding a New Contact

You can add a new contact for a business customer.


To add a new contact:

1. In the Customer panel, click the Add New Contact hyperlink. The Add Contact pop-up window is displayed.
2. Provide the corresponding information in the following panels, and click Confirm:
 - In the Customer Account panel, enter the first name and last name, middle initial, e-mail address, job title, and department of the contact.
 - In the Customer Contact Information panel, enter the contact's evening phone number, evening fax number, day phone number, day fax number, and mobile phone number.
 - In the Personal Information panel, enter the appropriate dates. To select a date, click the  icon and then select the month, year and day.
 - In the Contact Spending Limit panel, select the currency and enter the spending limit for the contact. In addition, specify an approving user and a backup approver. An approving user can approve an order for a contact who has exceeded a spending limit. A backup approver can approve orders for the contact if the contact is unavailable.
 - In the Web User panel, create a web user by entering a login ID, and selecting the locale and status for the contact. When you include information in these fields, the contact is linked to this web user, and an e-mail containing the web user's password is sent to the customer. In addition, you can select the user roles that you want to assign to this web user. User roles determine what a user can access on the web channel.

3.3.1.2 Adding Related Items or Replacing Items


You can add related product or service items to an order or replace the items in an order through a pop-up or a panel.

To add related items to an order or replace the items in an order through a pop-up:

1. Click the  icon. The Related Items pop-up window is displayed. You can view details such as the item description, item ID, unit price, associated quantity and the availability dates for Shipping, Pick Up, and Delivery.

Note: If the Check Inventory Configuration rule is not selected for related items, the availability dates will not be displayed.

2. Select the check boxes next to the product or service items that you want to add to the order.
3. Click Add to Order. If the item that you added has been configured to replace the original item, the new item replaces the original item and its related items.


The related item that you added is indicated by the  icon. The tooltip for the related item indicator displays the parent item description.

To add related product or service items to an order through a panel:

1. Place the cursor on the line for which related lines needs to be added. The Related Items panel is displayed at the bottom of the screen. You can view details such as the item description, item ID, unit price, associated quantity and the availability dates for Shipping, Pick Up, and Delivery.
2. Press the INSERT key to set focus to the related items panel. Press Insert if you want to set focus back to the parent item panel.

Note: If the Check Inventory Configuration rule is not checked for related items, the availability dates will not be displayed.

3. Click Add to Order. If the item that you added has been configured to replace the original item, the new item replaces the original item and its related items.

The related item that you added is indicated by the  icon. The tooltip for the related item indicator displays the parent item description.

Note: The associated quantity of related items is always displayed for 1 quantity of the parent item.

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

3.3.1.3 Selecting an Item's Style

Perform the following steps to select an item's style. Note that the following steps are applicable only if the Sterling Call Center and Sterling Store applications are configured to perform real-time availability checks for all the child items.

1. To check availability for items, you need to select:
 - Country or Region
 - State
 - Zipcode

If the postal code is entered, the fulfillment methods available for the items are enabled based on the Catalog Configuration and inventory availability.

If the postal code is not entered, then the possible fulfillment methods for the items are displayed based on the Catalog Configuration and not based on the inventory.

2. In the Fulfillment method panel, select the fulfillment method.

Note: If the Sterling Call Center and Sterling Store applications have been configured to check the availability of child items in a cached inventory, the Fulfillment Options panel will not be displayed.


3. Select the appropriate attributes and click the Add to Order button to add the stylized item to the order.

If the selected combination is not available, a message is displayed indicating you to change your selection since the item is not available.

3.3.2 Canceling an Order

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

In the Sterling Store application, you can validate whether or not the items to cancel are present in the store. After you enter the order cancellation details, the Validate Cancellation screen is displayed. You can verify whether or not the items to cancel are present in the store. After you complete the manual verification process, click OK.

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

For more information about canceling an order, see [Section 2.3.7, "Canceling an Order"](#).

3.3.3 Viewing and Confirming the Payment Details

You can view payment details such as the amount reduced, original total, new total, and details about the existing payment methods for the order. You can also add a coupon or new payment method, if necessary. For more information about viewing and confirming payment details, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).

3.3.4 Applying Hold

After creating an order, you can place the order on hold. Holds are usually placed to prevent further modifications to a particular order. Users who belong to a particular user group that has the necessary permissions can place an order on hold, at both the order level and the order line level. For more information about applying holds, see [Section 2.3.5, "Applying Hold"](#).

3.3.5 Removing Holds


When performing order modifications, the entire order or just certain order lines may be placed on hold to prevent further modifications. You can remove holds only if you belong to the user group that has permission to remove holds. For more information about removing holds, see [Section 2.3.6, "Removing Holds"](#).

3.3.6 Creating Store Returns

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

To create a return:

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

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

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

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

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

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

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

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

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

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

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

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

3.3.7 Initiating a Return


Customers may want to return or exchange some ordered items. In such situations, you can perform the Initiate Return task for those items that are in the shipped, delivered, or pick up status. For more information about initiating a return, see [Section 2.3.9, "Returning an Order"](#).


3.3.8 Adding Order Lines

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

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

To add multiple items to an order:

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


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

3. Perform [Step 11](#) through [Step 55](#) explained in [Section 3.3.1, "Creating an Order"](#).
4. Click Confirm.

3.3.9 Adding Open Box Items

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

To add open box items to an order:

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

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

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

3.3.10 Increasing Order Line Quantity

Sometimes a customer may want to increase the quantity of one or more items on an order that is already placed. In such situations, you can increase the order line quantity as requested by the customer. The line quantity can be increased for orders that have single or multiple order lines. To increase the order line quantity, first search for the order. For more information about increasing an order line quantity, see [Section 2.3.3, "Increasing Order Line Quantity"](#).

3.3.11 Tracking an Item or Inquiring About a Shipment

Customers may need to know the status of their orders. For example, if a customer does not receive items that were ordered, the customer may inquire about the shipment status. You can determine the shipment status for the order and inform the customer. For more information about tracking an item or inquiring about a shipment, see [Section 2.3.10, "Tracking an Item or Inquiring About a Shipment"](#).

3.3.12 Adding Notes to an Order

You may need to enter some additional notes on an order describing the various actions taken on that order for future reference. The Sterling Store application enables you to add notes at the order level and order line level, thus enabling you to track some important events. For more information about adding order notes, see [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).

3.3.13 Adding or Modifying Charges

The Add/Modify Charges screen provides information about the price details of an order. For more information about charge details, see [Section 2.3.11, "Adding or Modifying Charges"](#).

3.3.14 Scheduling and Releasing an Order

The Schedule and Release screen provides details of the status of each order line and also lets you to schedule and release an order. You can schedule and release an order if you belong to a user group, which has permission to do so.

For more information about scheduling and releasing an order, see [Section 2.3.12, "Scheduling and Releasing an Order"](#).

3.3.15 Viewing Procurement Orders

You can view the procurement orders for an order (purchase order/transfer order), if you belong to a user group which has permission to do so.

For more information about viewing procurement orders, see [Section 2.3.13, "Viewing Procurement Orders"](#).

3.3.16 Exempting an Order from Tax

You can exempt an order from tax for a business customer only if you belong to a user group that has the necessary permissions.

For more information about exempting orders from tax, see [Section 2.3.14, "Exempting an Order from Tax"](#).

3.3.17 Copying a Draft Order

When creating an order, a customer may decide to use an existing order to create new orders in the future, where applicable. For example, a customer may want to place two orders for the same items and may want the orders to be delivered on different dates. In such a scenario, you can copy the existing draft order to create a new order that is similar in content.

Note: You can create a new order from an existing draft order only if you belong to a user group that has the necessary permissions.

For more information about copying a draft order, see [Section 2.3.15, "Copying a Draft Order"](#).

3.3.18 Ordering Again

After placing an order, a customer may want to use that order to create a new order.

Note: You can create a new order from an existing confirmed order only if you belong to a user group that has the necessary permissions.

For more information about reordering an order, see [Section 2.3.16, "Ordering Again"](#).

3.3.19 E-mailing Order Information

If a customer wants to review the information pertaining to an order, you can send the information pertaining to the order through an e-mail.

Note: You can send the information pertaining to a draft order or a confirmed order to a customer only if you belong to a user group that has the necessary permissions.

For more information about sending order information to a customer through e-mail, see [Section 2.3.17, "E-mailing Order Information"](#).

3.3.20 Transferring a Draft Order to IBM Sterling Web

Draft orders can be created either by a customer service representative through the Sterling Call Center and Sterling Store applications, or by a customer through the Sterling Web application. Draft orders created in Sterling Web are accessible through Sterling Call Center and Sterling Store. However, draft orders that are opened through Sterling Call Center and Sterling Store are not accessible through Sterling Web. In such situations, you may want to transfer the draft order from Sterling Call Center and Sterling Store to Sterling Web to enable customers to access the draft orders. For more information about transferring draft orders to Sterling Web, see [Section 2.3.18, "Transferring a Draft Order to IBM Sterling Web"](#).

3.3.21 Launching the Applications Manager

You can use this task to launch the Applications Manager from within the Sterling Call Center and Sterling Store user interface. A CSR may sometimes need to launch the Applications Manager, for example, a CSR may want to adjust the inventory for an item. For more information about launching the Applications Manager, see [Section 2.3.19, "Launching the Application Console"](#).

3.4 Performing Opportunity and Quote Tasks

This section explains how to perform the following opportunity and quote tasks:

- [Creating an Opportunity](#)
- [Modifying Opportunity Details](#)
- [Marking an Opportunity as Lost](#)
- [Creating a Quote](#)
- [Reworking a Quote](#)
- [Copying a Quote as a New Quote](#)
- [Copying a Quote as Alternative Quote](#)
- [Viewing Alternate Quotes](#)
- [Viewing or Modifying Problem Lines in a Quote](#)
- [Quote Approvals](#)
- [Presenting a Quote to a Customer](#)
- [Accepting a Quote on Behalf of a Customer](#)
- [Rejecting a Quote on Behalf of a Customer](#)
- [Generating a Proposal](#)
- [Converting Quote to Order](#)
- [Abandoning a Quote](#)

3.4.1 Creating an Opportunity

An opportunity is a container to hold a quote or related alternative quotes that can be presented to a customer. Related alternative quotes are a set of quotes that exist at the same time and are independent of each other, but are associated with the same opportunity. Irrespective of the number of quotes in an opportunity, only one can be accepted by a customer. For more information about creating an opportunity, see [Section 2.4.1, "Creating an Opportunity"](#).

3.4.2 Modifying Opportunity Details

After an opportunity is created for a customer, you can modify the details of the opportunity, for example, if the opportunity is expected to be closed at a date later than the one you had earlier anticipated, you can change the opportunity's Anticipated Close Date by selecting a new date. For more information about modifying the opportunity details, see [Section 2.4.2, "Modifying Opportunity Details"](#).

3.4.3 Marking an Opportunity as Lost

You can mark an opportunity as Lost if the opportunity no longer serves any purpose. For example, when an opportunity is still in the Inquiry status, a customer may have purchased the products from another seller. In such a scenario, you may want to mark the opportunity as Lost and provide reasons for losing the opportunity. For more information about marking an opportunity as Lost, see [Section 2.4.3, "Marking an Opportunity as Lost"](#).

3.4.4 Creating a Quote

A quote is a commercial document that allows a prospective buyer to see a predetermined set of products and quantities at a predetermined price to be delivered on a specific date. For more information about creating a quote, see [Section 2.4.4, "Creating a Quote"](#).

3.4.5 Reworking a Quote

After a quote is Created and before it is Accepted or Ordered, the quote can be modified or restored to its original status by reworking the quote. The quote rework task restores the quote to the Created status and removes existing approvals on the quote. This enables users to modify

the quote if it has been rejected internally or by a customer. For more information about reworking a quote, see [Section 2.4.5, "Reworking a Quote"](#).

3.4.6 Copying a Quote as a New Quote

You may sometimes want to copy a quote that is associated with an opportunity to create a new quote and opportunity. For example, a user may want to use the item information and payment details of an existing quote for a different quote and opportunity. For more information about copying a quote as a new quote, see [Section 2.4.6, "Copying a Quote as a New Quote"](#).

3.4.7 Copying a Quote as Alternative Quote

You may sometimes want to offer alternative quotes to a customer. For example, consider that a customer is interested in purchasing 10 computers. A user may create a quote for 10 desktop computers, offering a discount of 5% on the quote total. To provide the customer with another option to choose from, the user may create another quote for 5 desktop computers and 5 laptops, offering a discount of 7% on the quote total. For more information about copying a quote as an alternative quote, see [Section 2.4.7, "Copying a Quote as Alternative Quote"](#).

3.4.8 Viewing Alternate Quotes

Alternative quotes are quotes that are independent of each other, but are associated with a single opportunity. Alternative quotes are used to present different options to a customer. A customer can, however, accept only one option. For more information about viewing alternate quotes, see [Section 2.4.8, "Viewing Alternate Quotes"](#).

3.4.9 Viewing or Modifying Problem Lines in a Quote

If a quote contains problem lines and if you request an approval for the quote, present the quote to a customer, or convert the quote to an order, you will be redirected to the View Problem Lines screen to enable you to fix the problem lines before proceeding further. For more information about viewing problem lines of a quote, see [Section 2.4.9, "Viewing or Modifying Problem Lines in a Quote"](#).

3.4.10 Quote Approvals

You can present a quote to a customer only if the quote is in the Approved status. Based on the configuration, the quote may or may not require to be approved.

- If the quote does not require any approval by the approvers as defined in an approval plan, Sterling Call Center and Sterling Store automatically changes the status of a quote to Approved.
- If the quote requires approval, the quote must be approved by the approvers as defined in an approval plan before presenting the quote to a customer.

For more information about quote approvals, see [Section 2.4.10, "Quote Approvals"](#).

3.4.11 Presenting a Quote to a Customer

After all the necessary approvals have been obtained for a quote, you can present the quote to the customer for whom the quote has been created so that the customer can provide feedback on the quote. For more information about presenting a quote to a customer, see [Section 2.4.11, "Presenting a Quote to a Customer"](#).

3.4.12 Accepting a Quote on Behalf of a Customer

You can accept a quote on behalf of a customer. For example, a customer may agree to all the conditions laid down in a quote, and may want the quote to be processed so that the customer can place an order for the products in the quote. For more information about accepting a quote on behalf of a customer, see [Section 2.4.12, "Accepting a Quote on Behalf of a Customer"](#).

3.4.13 Rejecting a Quote on Behalf of a Customer

After a quote has been presented to a customer, you can reject the quote on behalf of the customer. For example, if a customer wants to reject a quote based on the quote price, you can reject the quote on the customer's behalf. For more information about rejecting a quote on behalf of a customer, see [Section 2.4.13, "Rejecting a Quote on Behalf of a Customer"](#).

3.4.14 Generating a Proposal

You may sometimes want to generate a proposal from a quote and send it to a customer. For example, you may want to print a proposal in the PDF format and e-mail it to the customer as an attachment. For more information about generating a proposal, see [Section 2.4.14, "Generating a Proposal"](#).

3.4.15 Converting Quote to Order

After a customer accepts a quote in its current form, a user might want to convert the quote to an order. For more information about converting a quote into an order, see [Section 2.4.15, "Converting Quote to Order"](#).

3.4.16 Abandoning a Quote

If you feel that a quote no longer serves a purpose, you can abandon the quote. For example, due to oversight, if you create a quote, you can abandon the quote. For more information about abandoning a quote, see [Section 2.4.16, "Abandoning a Quote"](#).

3.5 Performing Fulfillment Tasks

This section explains how to perform the following fulfillment tasks:

- [Modifying Fulfillment Options](#)
- [Fulfillment Summary](#)
- [Delivery and Service Grouping](#)
- [Modifying Service Instructions](#)
- [Modifying Service Appointments](#)
- [Managing Delivery Service Option](#)
- [Modifying the Ship To Address](#)
- [Reshipping an Item](#)

3.5.1 Modifying Fulfillment Options

When a customer requests a change in the fulfillment options for an item, you can modify the fulfillment options as requested. For example,

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

To modify the fulfillment options:

1. From Navigator > Fulfillment, select Change fulfillment options. The Change Order Fulfillment Options screen is displayed.
2. Select the Perform Advanced Service Grouping check box to group the order lines into smaller groups to ensure that appointments will be available for the various services and click Next. For more information about adding order lines to a group, see [Section 2.5.3, "Delivery and Service Grouping"](#).

Note: The Perform Advanced Service Grouping check box is displayed in the Change Fulfillment Options screen only if delivery or service order lines or both exist and if you have permissions to perform the Delivery and Service Grouping task.

3. Check the boxes of the items for which you want to modify the fulfillment options.
 - If you want to modify the fulfillment options for all items on the order, check the Check All box.
 - You can view the expected date of fulfillment for the order line in the Expected Date column. The expected date for:
 - Pick Up—displays the earliest date on which the customer can pick up the item from a store.
 - Shipping—displays the earliest date on which the item will be shipped from the warehouse.
 - Delivery—displays the earliest date on which the item will be shipped from the warehouse.

The expected date of fulfillment does not display for the order line if:

- The requested pick up date does not exist
Or
- The work order appointment is not created

Note: When you change the fulfillment option for a parent bundle item which is configured as ship independent, the fulfillment method for the component lines is automatically selected for modification.

For a bundle parent item which is configured as ship together, only the parent bundle item is displayed.

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

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

4. Choose the appropriate fulfillment method.
5. When the customer wants to pick up items from the store, choose the "Pick Up" fulfillment method.
 - a. If the customer wants to pick up the items from the store where the order was placed, choose Pick Up from Current Store.

If the customer wants to pick up the items from other stores:

 - Choose Select other store.
 - Select the country or region from the drop-down list where you want to pick up the items.
 - Enter the Postal Code or City, State.
 - Click Search. The More Stores screen is displayed. For more information about viewing inventory in other stores, see [Section 2.3.2.2, "Viewing Inventory in Other Stores"](#).

- Select the appropriate store.
 - Click Apply.
- b. Click Next. The Fulfillment Summary Screen is displayed. For more information about fulfillment summary details, see [Section 2.5.2, "Fulfillment Summary"](#).
6. When the customer wants the items to be shipped, follow these steps:
- a. Choose the Ship fulfillment method. The Ship To address must be entered.
- Select an address and click the Modify Address hyperlink to modify the address and click Apply.
 - Click the New Address hyperlink to enter a new address and click Apply.

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

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

- b. From the Service drop-down list, select the appropriate carrier service that the customer requests for item delivery.
- c. Click Apply.
- d. If you skip the customer identification step when capturing the order, you must enter an address for all the order lines that are being shipped or delivered.
- e. Click Next.
- The Fulfillment Summary screen is displayed where you can view and modify the complete configuration of an order and how it is being fulfilled. For more information about fulfillment summary, see [Section 2.5.2, "Fulfillment Summary"](#).

Note: The Fulfillment Summary screen is displayed only if the fulfillment method is either Ship or Pick Up.

- f. Click Next.
 - If any order lines are being delivered and the newly added lines require a new appointment or an existing appointment to be retaken, the Service Appointment screen is displayed. For more information about selecting an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about the service fulfillment, see [Section 2.5.6, "Service Fulfillment Summary"](#).
7. When the customer wants the items to be delivered to their doorstep, follows these steps:
 - a. Choose the Delivery fulfillment method. The Deliver To address must be entered.
 - Select an address and click the Modify Address hyperlink to modify the address and click Apply.
 - Click the New Address hyperlink to enter a new address and click Apply.

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

Note: Based on the configuration, the Fulfillment option is displayed. For more information about displaying Shipping and Delivery as a separate fulfillment option, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

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

- b. If you skipped the customer identification step when capturing the order, enter the address for all order lines that are being delivered.
- c. Click Next.
 - If any order lines are being delivered and the newly added lines require a new appointment or an existing appointment to be retaken, the Service Appointment screen is displayed. For more information about selecting an appointment, see [Section 2.5.5, "Modifying Service Appointments"](#).
 - If the order contains existing service appointments that have not been affected by the addition of lines, the Service Fulfillment Summary screen is displayed. For more information about the service fulfillment, see [Section 2.5.6, "Service Fulfillment Summary"](#).

Note: If the status modification rules do not allow you to change the fulfillment method of an item, the order line is displayed in red.

8. When the customer wants to change the address for the provided service line:
 - a. Select all service lines in the list. The Service Address panel is displayed.
 - Select an address and click the Modify Address hyperlink to modify the address and click Apply.

- Click the [New Address](#) hyperlink to enter a new address and click **Apply**.

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

- b.** Click **Next**. The Fulfillment Summary Screen is displayed. For more information about the fulfillment summary details, see [Section 2.5.2, "Fulfillment Summary"](#).
- 9.** If the customer wants to pick up the items at a nearby store, select **Pick Up Selected Items From This Store**. By default, the local store is selected.
 - a.** From the **Store Pick Up** drop-down list, select the store from where the customer wants to pick up the items.

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

 - Click the [More Stores](#) hyperlink. The **More Stores** screen is displayed.
 - Select the store from where the customer wants to pick up the item.
 - To search for a store located in a particular area, enter the postal code of the area and click **Search**. A list of available stores is displayed. Select the appropriate store from the list.
 - Enter the pick up date as requested by the customer.
 - b.** Click **Apply**.
 - c.** Click **Next**. The **Confirm Payment** screen is displayed where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).
- 10.** In certain situations, your store may be processing orders for which the customer has requested a change in the fulfillment options. For example, an order is created and about to be shipped to the customer from your store, the customer may request to pick the items from the store. In such situations, an appropriate message displays that prompts you to manually verify whether the fulfillment options can be modified. After performing the manual verification process, click **Verified**.

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

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

- If the fulfillment method is "Shipping", you can view the ship to address.
 - If the fulfillment method is "Pick Up", you can view the pick up date.
12. To view or modify the fulfillment options for one or more order lines, click the "View all order lines" hyperlink. The Change Order Fulfillment Options screen is displayed. Perform [Step 1](#) through [Step 11](#), if applicable.
 13. Modify the fulfillment method or ship to address of an item appropriately.
 14. Click Apply. A warning message displays prompting you to verify if the changes requested by the customer can actually be made.
 15. Verify if the modifications made can be applied to the item and click Verified.
 16. Click Next. The Confirm Payment screen is displayed where you can view the payment details for the order. For more information about payment confirmation, see [Section 2.3.8, "Viewing and Confirming the Payment Details"](#).

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

3.5.2 Fulfillment Summary

The Fulfillment Summary screen provides information about how an order is created and is being fulfilled. For instance, you can view the details of an order such as the recently added order lines, gift items, open box items, related items, and so forth. You can group order lines together based on the fulfillment method. For more information about

viewing the fulfillment summary for an order, see [Section 2.5.2, "Fulfillment Summary"](#).

3.5.2.1 Override Availability

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

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

3.5.2.1.1 System Returns Availability

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

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

3.5.2.1.2 System Returns Unavailability

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

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

3.5.3 Delivery and Service Grouping

When a complex order pertaining to numerous products, provided services, and delivery services exists, users can group the order lines into smaller groups to ensure that appointments are available for the various services. For more information about grouping order lines, see [Section 2.5.3, "Delivery and Service Grouping"](#).

3.5.4 Modifying Service Instructions

When a customer requests a change in the service instructions for an item at the time of delivery, you can modify the service instructions as requested. For more information about modifying service instructions, see [Section 2.5.4, "Modifying Service Instructions"](#).

3.5.5 Modifying Service Appointments

When a customer requests a change in the service date and time, you can change the service appointment. For more information about modifying service appointments, see [Section 2.5.5, "Modifying Service Appointments"](#).

3.5.6 Managing Delivery Service Option

When a customer request to modify the delivery service options for an item, in such cases you can modify the delivery service options as requested. For more information about modifying delivery service options, see [Section 2.5.7, "Managing Delivery Service Option"](#).

3.5.7 Modifying the Ship To Address

Sometimes, a customer provides incorrect ship to address information when placing an order. In such situations, the customer may request to modify the ship to address. For more information about modifying the ship to address, see [Section 2.5.8, "Modifying Order Addresses"](#).

3.5.8 Reshipping an Item

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

To reship an item, you must track the item. For more information about tracking an item, see [Section 2.3.10, "Tracking an Item or Inquiring About a Shipment"](#).

To reship an item:

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

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

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

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

9. If you need to issue a refund for all items, choose Create Refund for All Items.
10. In the Notes panel, you can view or add any additional information.
11. Click Previous to go to the previous screen. If you click the Previous button, it does not allow you to undo any previous action.
12. Click Next.

If the items need to be delivered, the Select An Appointment screen is displayed. You can modify the service appointment of the items. For more information about modifying service appointments, see [Section 2.5.5, "Modifying Service Appointments"](#).

13. The Confirm Payment screen is displayed. For more information about payment confirmation, see [Section 3.3.3, "Viewing and Confirming the Payment Details"](#).

3.6 Performing Price Match Tasks

This section explains how to perform the following price match related tasks:

- [Matching an Item's Price](#)
- [Searching for a Price Match](#)
- [Adding a New Price Match](#)
- [Searching for a Competitor](#)
- [Adding a New Competitor](#)

3.6.1 Matching an Item's Price


A customer may discover that another retailer is selling the same items that were ordered at a lesser price. In such situations, you may look into the claims of the customer and price match the items, if necessary. For more information about matching the price of an item, see [Section 2.6.1, "Matching an Item's Price"](#).

3.6.2 Searching for a Price Match

You may sometimes need to search for a price match record.

To search for a price match:

1. From Tasks > Price Match, select Price Match Search. The Price Match Search and List screen is displayed.
2. Enter the appropriate search criteria and click Search. The search results are displayed in the Price Match Results panel.

If you cannot find the pertinent price match, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

3. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

4. Double-click the appropriate price match. The price match details screen is displayed. For more information about viewing the price match details, see [Section 3.6.2.1, "Viewing Price Match Details"](#).
5. Click the Add button to add a new price match. For more information about adding a new price match, see [Section 3.6.3, "Adding a New Price Match"](#).

3.6.2.1 Viewing Price Match Details




In the Price Match Details screen, you can view the details of a price match such as competitor's name, enterprise code.

1. In the Price Match Details panel, you can view the enterprise code, item ID, UOM, expiration date of the price match, status of the price match, competitor, the minimum quantity to be price matched, competitor's unit price and competitor's discounts.
2. In the Price Match Description panel, you can view a brief description of the price match.
3. In the Order Lines Available panel, you can view the order lines on which the price match can be applied.
4. In the Order Lines Unavailable panel, you can view the order lines on which the price match cannot be applied.

3.6.3 Adding a New Price Match

Sterling Call Center and Sterling Store provides the ability to add a new price match, if the price match does not already exist.

To add a new price match:

1. From Tasks > Price Match, select Add Price Match. The Price Match Details screen is displayed.
2. Enter the item ID or click the  icon. The Advanced Add Item Search screen is displayed. Select the item from the list.
3. Enter the unit of measure for the item selected.
4. Select the expiration date for the price match. To select a date, click the  icon and then select the month, year and day.
5. Select the status for the price match from the drop-down list.
6. Enter the competitor or click the  icon to search for the competitor. Enter the minimum quantity to be price matched, the competitor's unit price and competitor's discounts.
7. Click Confirm to add the price match.

3.6.3.1 Modifying a Price Match

Sterling Call Center and Sterling Store provides the ability to modify an existing price match, for example, you may want to extend the expiration date of a price match.

To modify an existing price match, you must first search for a price match. For more information about searching for a price match, see [Section 3.6.2, "Searching for a Price Match"](#).


1. In the Price Match Details panel, you can view the enterprise code, item ID, UOM, expiration date of the price match, status of the price match, competitor, the minimum quantity to be price matched, competitor's unit price, and competitor's discounts.
 - For an approved price match, you can only modify the expiration date.
 - For a pending or rejected price match, you can modify the expiration date, status of the price match, competitor's unit price and competitor's discounts.
2. In the Price Match Description panel, enter a brief description of the price match.
3. In the Order Lines Available panel, you can view the order lines on which the price match can be applied.
4. In the Order Lines Unavailable panel, you can view the order lines on which the price match cannot be applied.

3.6.4 Searching for a Competitor

You may sometimes need to search for a competitor when performing a price match.

To search for a competitor:

1. From Tasks > Price Match, select Competitor Search. The Competitor Search and List screen is displayed.
2. Enter the appropriate search criteria and click Search. The search results display in the Competitor Results panel.

If you cannot find the pertinent competitor, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

3. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More Records hyperlink is not displayed, instead the message "No More Records" is displayed.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

4. Double-click the appropriate competitor. The Competitor details screen is displayed. For more information about viewing the Competitor details, see [Section 3.6.4.1, "Viewing Competitor Details"](#).

3.6.4.1 Viewing Competitor Details

In the Competitor Details screen, you can view the details of a competitor such as competitor's name, enterprise code.

1. In the Competitor Details panel, you can view the competitor's name, enterprise code, status of the enterprise, percentage of the price match, and the web address of the competitor.
2. In the Description panel, you can view a brief description of the competitor.

3.6.5 Adding a New Competitor

Sterling Call Center and Sterling Store provides the ability to add a competitor if the competitor does not already exist.

1. Do one of the following to add a new competitor :

- From Tasks > Price Match, select Competitor Search. The Competitor Search and List screen is displayed. Click the Add button, The Add Competitor screen is displayed.
 - From Tasks > Price Match, select Add Competitor. The Add Competitor screen is displayed.
2. In the Competitor Details panel, enter the competitor's name, enterprise code, status of the enterprise, percentage of the price match, and the web address of the competitor.
 3. In the Description panel, enter a brief description of the competitor.
 4. Click Confirm.

3.7 Performing Other Tasks on an Order

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

- [Setting Up Gift Options](#)
- [Appeasing Customers](#)
- [Adding a Coupon or Promotion Code](#)
- [Changing Payment Methods](#)
- [Viewing Payment Details](#)
- [Inquiring About Returns and Exchanges](#)
- [Reconfiguring Items](#)

3.7.1 Setting Up Gift Options

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

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

- The customer places an order at the store and wants the store to ship the items to the recipient as a gift. In this case, you must mark the item as gift and capture the recipient's ship to address.
- The customer places an order at the store and wants the store to deliver the items to the recipient as gift items. In such situations, the CSR marks the items as gift items and captures the delivery address of the recipient.

For more information about marking items as gift items, see [Section 2.7.1, "Setting Up Gift Options"](#).

3.7.2 Appeasing Customers

When a customer is not satisfied or has had a bad experience with any of the services that were provided, you can present them with the option to appease them. For example, a customer may walk in to a store to report having received a damaged item. In such situations, you need to perform an appeasement task to make amends for the bad experience. For more information about appeasing customers, see [Section 2.7.2, "Appeasing Customers"](#).

3.7.3 Adding a Coupon or Promotion Code

You can add a coupon or promotion code to an order on the request of a customer who has already placed an order. You can add any number of coupons to an order. For more information about adding a coupon or promotion code, see [Section 2.7.3, "Adding a Coupon or Promotion Code"](#).

3.7.4 Changing Payment Methods

A customer may need to change the mode of payment for an order. To change the payment method for an order, you need to first search for the order. For more information about changing payment methods, see [Section 2.7.4, "Changing Payment Methods"](#).

3.7.5 Viewing Payment Details

You can view payment details for an order placed by the customer such as charges, refunds, and payment methods. For more information about viewing payment details, see [Section 2.7.5, "Viewing Payment Details"](#).

3.7.5.1 Adding or Modifying Charges

The Add/Modify Charges screen provides information about the existing charges and also lets you to modify an existing charge or add a new charge.

In the Modify Charges panel, you can view the charge category, charge name and the charge amount.

1. If you want to add a new charge, click the Add Charge hyperlink. Select the category from the Charge Category drop-down list. Select the name of the charge from the Charge Name drop-down list. In the Charge Amount column, enter the appropriate amount for the charge.
2. In the Notes panel, enter any additional information, if applicable. For more information about adding notes to an order, see [Section 2.3.4, "Viewing and Adding Notes to an Order"](#).
3. Click Confirm.

3.7.6 Inquiring About Returns and Exchanges

Customers may inquire about returns, exchanges, and refunds for an order. For more information about inquiring about returns and exchanges, see [Section 2.7.6, "Inquiring About Returns and Exchanges"](#).

3.7.7 Reconfiguring Items

Sterling Call Center and Sterling Store provides rich functionality to reconfigure bundle items. For example, if the customer has ordered for a computer and wants to change the configuration of the processor, this task enables you to change the necessary configurations. For more information about reconfiguring an item, see [Section 2.7.7, "Reconfiguring Items"](#).

3.8 Performing Customer Tasks

This section explains how to perform the following customer tasks:

- [Creating a Consumer Customer](#)
- [Creating a Business Customer](#)
- [Managing Customer Contacts](#)

- [Resetting a User's Password](#)
- [Managing Business Customer Information](#)
- [Managing Customer Addresses](#)
- [Managing Customer Payment Method](#)
- [Assigning Customer to a Team](#)
- [Customer User Assignments](#)
- [Customer Self Assignments](#)
- [Viewing Account Activity](#)
- [Viewing and Adding Customer Notes and Contact Notes](#)

3.8.1 Creating a Consumer Customer

Sterling Call Center and Sterling Store provides the functionality to create, manage, and view consumer customers. For more information about creating a consumer customer, see [Section 2.8.1, "Creating a Consumer Customer"](#).

3.8.2 Creating a Business Customer

Sterling Call Center and Sterling Store provides the functionality to create, manage, and view business customers. For more information about creating a business customer, see [Section 2.8.2, "Creating a Business Customer"](#).

3.8.3 Managing Customer Contacts

You can define multiple contacts for each business customer. To manage a customer contact, you must first search for a customer. For more information about managing customer contacts, see [Section 2.8.3, "Managing Customer Contacts"](#).

3.8.4 Resetting a User's Password

Sterling Call Center and Sterling Store provides the functionality to reset a user's password, if a user ID is associated to the user's record. For more information about resetting a user's password, see [Section 2.8.4, "Resetting a User's Password"](#).

3.8.5 Managing Business Customer Information

Sterling Call Center and Sterling Store provides the functionality to manage business customer information. For more information about managing business customer information, see [Section 2.8.5, "Managing Business Customer Information"](#).

3.8.6 Managing Customer Addresses

You can define multiple addresses for each customer. To manage customer addresses, you must first search for a customer. For more information about managing customer addresses, see [Section 2.8.6, "Managing Customer Addresses"](#).

3.8.7 Managing Customer Payment Method

You can define multiple payment methods for a customer, based on the configuration. To manage customer payment methods, you must first search for the corresponding customer. For more information about managing customer payment methods, see [Section 2.8.7, "Managing Customer Payment Method"](#).

3.8.8 Assigning Customer to a Team

Sterling Call Center and Sterling Store enables you to assign customers to a team after the customer is created. A supervisor can assign a customer from his team to any of his sub teams. To assign a customer to a team, you must first search for a customer. For more information about managing team assignments, see [Section 2.8.8, "Assigning Customer to a Team"](#).

3.8.9 Customer User Assignments

Sterling Call Center and Sterling Store enables you to assign customers to a user after the customer is created. A supervisor can assign a customer from his team to any of the users in his sub-teams. For more information about managing user assignments, see [Section 2.8.9, "Customer User Assignments"](#).

3.8.10 Customer Self Assignments

Sterling Call Center and Sterling Store enables you to assign customers to a user, once the customer is created. A user can assign a customer to himself only if the user is assigned permissions to access the customer record. For more information about managing user assignments, see [Section 2.8.10, "Customer Self Assignments"](#).

3.8.11 Viewing Account Activity

Sterling Call Center and Sterling Store provides the functionality to view the Sterling Multi-Channel Selling Solution's Account Activity. For more information about viewing account activity, see [Section 2.8.11, "Viewing Account Activity"](#).

3.8.12 Viewing and Adding Customer Notes and Contact Notes

Sterling Call Center and Sterling Store provides the functionality to enter additional notes about a customer or contact. For example, you may want to add a note stating that a customer can be contacted only on Tuesdays and Thursdays. For more information about viewing and adding customer notes and contact notes, see [Section 2.8.12, "Viewing and Adding Customer Notes and Contact Notes"](#).

3.9 Performing User Management Tasks

This section explains how to perform the following user management tasks:

- [Managing Users](#)

A user is an employee of the enterprise organization who can log in to the Sterling applications.

- [Managing User Teams](#)

A user team is a collection of users who have common data and user interface access requirements. User teams can have access to specific document types, enterprises, ship nodes, customers, and screens within the user interfaces.

3.9.1 Managing Users

Sterling Call Center and Sterling Store provides the ability to create and manage users. For more information about creating and managing users, see [Section 2.9.2, "Managing Users"](#).

3.9.2 Managing User Teams

Sterling Call Center and Sterling Store provides the ability to create and manage user teams. For more information about creating and managing user teams, see [Section 2.9.3, "Managing User Teams"](#).

3.10 Performing Return Order Tasks

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

- [Create a Return Order](#)
- [Add a Return Reason](#)
- [Add Items to an Exchange](#)
- [View or Change Return and Exchange Fulfillment Options](#)
- [View or Change Fulfillment Summary](#)
- [View or Change Payment Summary](#)
- [Change Return Address](#)
- [View or Change Service Fulfillment Summary](#)
- [Issue a Refund](#)
- [Modify Service Appointments](#)
- [Report Extra Items](#)
- [Report Wrong Items](#)
- [Report Unexpected Items](#)
- [Cancel a Return Order](#)
- [Creating an Exchange Order](#)
- [Changing Return Method](#)

3.10.1 Create a Return Order

A customer may want to return or exchange items that were purchased.

This section describes only the Sterling Store functionality for creating a Return Order. For more information about creating returns, see [Section 2.10.1, "Creating a Return Order"](#).

Sterling Store provides the functionality to scan an item into a return order.

To scan an item for return, select the By Order tab. An Item ID field is displayed. When you scan the item, the Item ID is displayed in the Item ID field. If the item scanned is not on the order, an error message is displayed indicating that the Item ID was not found.

An item that you scan is automatically marked "in hand" when you scan it. Returns without a receipt and returns by Extra Item (items that the customer received by mistake) are also assumed to be "in hand" by the system.

If you are not scanning an item, the return panel contains Item is in Hand and All Selected Items Are Present check boxes.

You can also indicate whether the items are being returned by the customer who originally purchased it or by a gift recipient.

Note: In the Sterling Store application, returns without a receipt and returns by Extra Item will always be considered as "in hand".

3.10.2 Add a Return Reason

When you perform a return for a customer, you must enter a return reason.

This section describes only the Sterling Store functionality for the Return Reason screen. For more information about the Return Reason screen, see [Section 2.10.2, "Adding a Return Reason"](#).

Sterling Store provides the ability to enter disposition notes for the items that are in hand.

For items that are marked in hand on the line selection screen, enter the Return Disposition Code in the drop-down list on the Return Reason

screen. Your enterprise may have Disposition Codes such as Sent for Repair, Scrapped, Restocked, and others.

3.10.3 Identifying a Customer

The Customer Identification screen allows you to search for an existing customer and create a new Business customer or Consumer customer. For more information about customer identification, see [Section 2.10.3, "Identifying a Customer"](#).

3.10.4 Add Items to an Exchange

If a customer wants to exchange items that are being returned, you need to create an exchange order for the corresponding return order. For more information about creating an exchange order, see [Section 2.10.4, "Adding Items to an Exchange"](#).

3.10.5 View or Change Return and Exchange Fulfillment Options

The Exchange Fulfillment Options screen enables you to change the fulfillment method on the exchange order, as well as changing the shipping/delivery addresses and pick up locations. If customer information is missing, the Customer Information screen is displayed. For more information, see [Section 2.1.2, "Searching for a Customer"](#).

For more information about changing the fulfillment method, see [Section 2.5.1, "Modifying Fulfillment Options"](#).

3.10.6 View or Change Fulfillment Summary

The Fulfillment Summary screen enables you to view and change Shipping, Pick Up, and Delivery methods for return and exchange lines. These are grouped by fulfillment method and address. You can also see lines that are in hand displayed in their own panel. You cannot change the in hand status on this screen.

For more information about the Fulfillment Summary, see [Section 2.10.6, "Viewing or Modifying Fulfillment Summary"](#).

3.10.7 View or Change Payment Summary

You can view and change the return and exchange order payment details on the Payment Summary screen.

This section describes the Sterling Store functionality only for the Payment Summary. For more information about the Payment Summary, see [Section 2.10.7, "Viewing or Modifying the Payment Summary"](#).

The following Sterling Store features apply:

- When items that are not in hand are received at a warehouse, a receipt is started so that the customer receives a refund.
- When items are in hand, the system sets items that are to be picked up or shipped to Released status.

3.10.8 Change Return Address

If a customer wants to change the address of a return order, you must search for the return order. For more information about changing return address, see [Section 2.10.8, "Changing Return Address"](#).

3.10.9 View or Change Service Fulfillment Summary

You can view the summary of all appointments related to the return order and the corresponding exchange order, if applicable. In the Appointment panel, you can view the appointment number, the current appointment, if an appointment has been taken, and the service charges applicable for the service. For more information about viewing the service fulfillment summary, see [Section 2.10.9, "Viewing or Modifying Service Fulfillment Summary"](#).

3.10.10 Issue a Refund

A customer may call to inquire about why he has not been refunded for the items which have already been returned. In such situations, you need to issue a refund for the items immediately. Sterling Call Center and Sterling Store provides the Issue Refund Now task that enables you to issue a refund to the customer immediately. For more information about issuing a refund, see [Section 2.10.10, "Issuing a Refund"](#).

3.10.11 Modify Service Appointments

Sometimes a customer may want to change the service appointment of a return order. To change the service appointment, you must search for the return order. For more information about modifying service appointments, see [Section 2.10.11, "Modifying Service Appointments"](#).

3.10.12 Report Extra Items

Sometimes a customer may report that the customer has received extra items. In such situations, the extra items can either be returned back or you can allow the customer to keep the extra items. To report extra items, you must first search for the order. For more information about searching reporting extra items, see [Section 2.10.12, "Reporting Extra Items"](#).

3.10.13 Report Wrong Items

Sometimes a customer may report that he did not receive the items that were ordered. In such situations you may need to reship the items that were ordered and also create a return for the wrong items that were delivered. For more information about reporting wrong items, see [Section 2.10.13, "Reporting Wrong Items"](#).

3.10.14 Report Unexpected Items

Sometimes a customer may report that he did not order for any items but has received some items. In such situations you may need to create a customer and then create a return for the wrongly shipped items. For more information about reporting unexpected items, see [Section 2.10.14, "Reporting Unexpected Items"](#).

3.10.15 Cancel a Return Order

A customer may want to cancel some of the items or the entire return order. The customer may also want to cancel the exchange order corresponding to the return order. For more information about canceling a return order, see [Section 2.10.15, "Canceling a Return Order"](#).

3.10.16 Creating an Exchange Order

A customer may want exchange items to be created for the items that are being returned. In such situations, you need to create an exchange order for the corresponding return order. For more information about creating an exchange order, see [Section 2.10.16, "Creating an Exchange Order"](#).

3.10.17 Changing Return Method

Sometimes a customer may want to change the fulfillment method of a return order. For more information about changing the return method, see [Section 2.10.17, "Changing Return Method"](#).

3.11 Performing Order Print Tasks

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

The following print tasks are performed in the Sterling Store application:

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

3.11.1 Printing Order Creation or Summary Slips

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

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

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

For more information about configuring payment options, see the *Sterling Call Center and Sterling Store: Implementation Guide*.

3.11.2 Printing Change Order Slips

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

3.11.3 Printing Return Order and Exchange Order Slips

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

3.11.3.1 Printing Return Order Without Exchange Order Slips

If payment is handled externally to Sterling Call Center and Sterling Store, the Return Order Confirmation screen is displayed:

This screen is displayed only if payment is handled externally. For field value descriptions, see [Table 3–2, "Return Order Without Exchange Order Slip Screen"](#).

Table 3–2 Return Order Without Exchange Order Slip Screen

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

3.11.3.2 Printing Return Order With Exchange Order Slips

If payment is handled externally to Sterling Call Center and Sterling Store, the Return Order Confirmation screen is displayed:

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

Table 3–3 Return Order With Exchange Order Slip Screen

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

3.12 Performing Alert and Queue Management Tasks

The Alert Management task enables you to create, resolve, and assign alerts to users. Typically, alerts are either raised by the system or manually created. The alert can be assigned to specific users or queues. The Alert and Queue Management task also provides an alert statistics report. This report provides visibility to alerts that are assigned to a specific user or queue. For more information about performing alert tasks, see [Section 2.11, "Performing Alert and Queue Management Tasks"](#).

3.13 Performing Announcement Tasks

The Announcement task enables users to post messages and other useful information pertaining to other users. Announcements can be created for specific user groups. Users who belong to a user group that has the necessary permission can create, view, and cancel announcements. For more information about announcements, see [Section 2.12, "Performing Announcement Tasks"](#).

3.14 Setting User Preferences

The Sterling Call Center and Sterling Store application enables you to configure user preferences such as display of alert notifications, additional help messages, keyboard shortcuts, customer message panel, scratch pad, position of related tasks, CSR Message/Customer Message panel. For more information about setting user preferences, see [Section 2.13, "Setting User Preferences"](#).

3.15 Viewing the Documentation Library

Sterling Call Center and Sterling Store enables you to access the product documentation library to view all the Sterling Call Center and Sterling Store application documents. Based on the configuration, either the Online Documentation Library or the Local Documentation Library is displayed. For more information about the documentation library, see [Section 2.14, "Viewing the Documentation Library"](#).

3.16 Performing Reports Tasks

Sterling Call Center and Sterling Store provides rich functionality to generate reports such as cross sell reports, CSR reports, and price match reports.

To view reports, from Tasks > Reports, select View My Reports. The My Reports screen is displayed. Click the YCD-Analytics hyperlink. The list of reports which can be generated is displayed.

3.16.1 Cognos 8 Business Intelligence Toolbar

This section describes the Cognos 8 Business Intelligence toolbar that appears in the Sterling Call Center and Sterling Store report. For more information about cognos business intelligence, see [Section 2.15.1, "Cognos 8 Business Intelligence Toolbar"](#).

3.16.2 Cross Sell Reports

Call Center Managers and Store Managers may need information about the cross sales performance of the call center or store. This report provides information about the best cross selling items. This report also allows you to compare the average cross sell revenue per order for a given period with the previous period. For more information about cross sell reports, see [Section 2.15.2, "Cross Sell Reports"](#).

3.16.3 CSR Reports

Call Center Managers and Store Managers may need to track information about the number of sales and revenue generated by a particular CSR or store associate. This report provides visibility into the number of sales, total cross sell, revenue generated, and alerts resolved during a specific

period of time. For more information about CSR reports, see [Section 2.15.3, "CSR Reports"](#).

3.16.4 Price Match Reports

Pricing Analysts and Product Managers may need information about the items that are frequently price matched, competitor against who the items are frequently priced matched etc. For more information about price match reports, see [Section 2.15.4, "Price Match Reports"](#).

3.17 Performing In-Store Pick up Tasks


This section explains how to perform pick up tasks.

- [Performing an Advanced Shipment Search](#)
- [Performing Backroom Pick](#)
- [Performing Undo Backroom Pick](#)
- [Performing Customer Pick](#)
- [Printing Pick Ticket](#)

3.17.1 Performing an Advanced Shipment Search

The Sterling Store application provides the advanced shipment search task to search for shipments which need to be picked up by the customer from the current store.

To perform an advanced shipment search:

1. From Tasks > In-Store Tasks, select Advanced Shipment Search. The Shipment search screen is displayed.
2. Enter the appropriate search criteria and click Search. The search results are displayed in the Search Results panel. If you cannot find the right shipment, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.
3. You can view details about the records being retrieved at the bottom of the screen. Click the Get More Records hyperlink to retrieve more records. If the search criteria specified results in a single page of records or if you are viewing the last page of records, the Get More

Records hyperlink is not displayed, instead the message "No More Records" is displayed.

The total number of records is displayed based on pagination rules configured. Click the Get Total Record Count hyperlink to view the total number of records returned for the search criteria.

Note: While retrieving the records, if any sorting or filtering is applied, the following message is displayed: "New records have been returned to a table that has been sorted or filtered. As a result, the new records have been inserted into the table based on the existing sort or filter criteria. All new records are highlighted." You can select the Don't notify me again box, not to display the message again.

4. Double-click the appropriate shipment record. The Shipment Details screen is displayed. For more information about viewing shipment details, see [Section 3.17.1.1, "Viewing Shipment Details"](#).

3.17.1.1 Viewing Shipment Details

In the Shipment Details screen you can view the details of a shipment such as the shipment number, status of the shipment.

- In the Shipment Details panel, you can view the shipment number, status of the shipment, service, seller, ship node and the number of containers in the shipment.
- In the Ship To Address panel, you can view the ship to address to where the shipment is sent.
- In the Bill To Address panel, you can view the details of the customer's address.
- In the Shipment Lines in this Shipment panel, you can view the items included in the shipment, quantity, unit price of the item and the order number corresponding to the shipment line.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its

components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

From the shipment details screen, you can perform any of the store tasks such as backroom pick, undo backroom pick, customer pick and print pick ticket.

- Click Close.

3.17.2 Performing Backroom Pick

A customer or a gift recipient may visit a store to pick up the items that were ordered. You may want to move the inventory to the customer pick area from where the customer can pick up the items.

To perform backroom pick:

1. From Tasks > In-Store Tasks, select Backroom Pick. The Shipment Search screen is displayed.
2. Enter the shipment number and click Search.

Note: If the shipment number is not valid, an error message "Enter a valid shipment number" is displayed.

Note: If the status of a shipment does not allow you to perform a backroom pick, the message "Shipment cannot be backroom picked in the current status" is displayed.

3. In the Shipment Details panel, you can view the order number, the date the store was notified on, shipment number, and the name of the customer.
4. In the Scan Item panel, scan the barcode of the item or the alternate item. The last scanned item is displayed in the Last Scanned Item field.

5. In the Items to be picked panel, you can view the item description, quantity to pick, and UOM. Enter the quantity you want to pick in the Quantity column.
6. Click Next. If the backroom pick is completed, the message "Backroom Pick is successful" is displayed. If there is a shortage, the Backroom Pick: Shortage Resolution screen is displayed.

In the Shortage Resolution panel:

- Select the Shortage Resolution Applies To All Lines option, if the shortage resolution is the same for all lines. Select the Inventory Shortage option if the reason for shortage is inventory shortage. Select the Will pick the items later option if the customer wants to pick up the items at a later time.
 - Select the Shortage Resolution Varies Line By Line option for selecting a shortage resolution for each line. In the Shortage Resolution column select the resolution from the drop-down list.
7. Click the Previous button to revisit the previous screen.
 8. Click Confirm.

3.17.3 Performing Undo Backroom Pick

Sterling Store enables you to undo a back room pick. To undo a backroom pick you must first search for a shipment. For more information about searching for a shipment, see [Section 3.17.1, "Performing an Advanced Shipment Search"](#).

Note: You can only undo backroom pick for a complete shipment line or an entire shipment.

If the backroom picked quantity is zero for all shipments lines, the message "No shipment line is available for undo pick" is displayed.

To perform an undo backroom pick:

1. From Tasks > In-Store Tasks, select Undo Pick. The Undo Pick screen is displayed.

Note: If the shipment is in a status for which you cannot undo backroom pick, the message "The shipment cannot be picked in the current status" is displayed.

2. In the Undo Pick panel, select the Undo Pick for entire shipment option, to undo pick of the complete shipment.
3. Select the Undo Pick for specific items option, to undo pick of individual lines and select the lines for which you want to perform an undo pick.
4. In the Shipment Lines in this Shipment panel, you can view the items included in the shipment, the order number corresponding to the shipment line, shipment quantity and quantity available for undo backroom pick.
5. In the Notes panel, you can add notes for the undo backroom pick activity. For more information about viewing or adding notes to an order, see [Section 3.3.12, "Adding Notes to an Order"](#).
6. Click Confirm.


3.17.4 Performing Customer Pick

A customer or a gift recipient may visit a store to pick up the items that were ordered. In such situations, you may have to verify the customer/gift recipient and then record the customer pick.

To perform a customer pick:

1. From Tasks > In-Store Tasks, select Customer Pick. The Shipment Search screen is displayed.

Note: If the shipment is in a status for which you cannot perform customer pick, the message "Shipment not ready for customer pick" is displayed.

2. Enter the appropriate search criteria and click Search. The search results are displayed in the Search Results panel. If you cannot find the right shipment, click  icon to show the search criteria. You can enter more restrictive search criteria for the selected task.

3. In the Search Results panel, you can view the name of the customer or gift recipient, address, order number, the date the store was notified on and the status of the shipment.
4. Double-click the appropriate shipment record. If you entered a credit card number as the search criteria, the Choose Item and Quantity to pick screen is displayed else the Customer Verification screen is displayed.
5. In the Customer Verification screen,
 - In the Shipment Details panel, you can view the order number, status of the shipment, requested pick date and shipment number.
 - In the Bill To Address panel, you can view the details of the customer's address.
 - If a gift recipient is picking up the items, you can view the details of the gift recipient such as the gift recipient's first name, last name and telephone number in the Gift Recipient Details panel.
 - In the Verification Details panel, select a verification type.
 - In the Notes panel, you can add notes for the customer verification activity. For more information about viewing or adding notes to an order, see [Section 3.3.12, "Adding Notes to an Order"](#).

Note: You can configure other verification types to be displayed in the Customer Verification screen.

Note: You can use Up and Down arrow keys to navigate through the verification types.

6. Click Next. The Choose Item and Quantity to pick screen is displayed.
 - In the Order Summary panel, you can view the name of the customer or name of the gift recipient, order number, the date the store was notified on, status of the shipment.
 - In the Bill To Address panel, you can view the details of the customer's address.

- In the Scan Item panel, scan the barcode of the item or the alternate item. The last scanned item and quantity are displayed in the Last Scanned Item and Last Scanned Quantity fields.
- In the Select Items to Pick panel, you can view the item description, ordered quantity, picked quantity, UOM, ordered unit price and total price.

If the order contains a bundle item, the unit price of the item is displayed as a hyperlink. To view the details of the bundle item, click the unit price hyperlink. The Component Lines pop-up window is displayed. You can view the details of the bundle parent and its components such as the quantity, unit price, line total, adjustments, and so on.

For more information about handling the pricing strategy defined for the bundle item, see [Section 2.1.4.3, "Viewing Prices of Bundle Items"](#).

7. Click Next. If there is a shortage for some items, the Shortage Resolution screen is displayed.
 - Select the Customer will pick remaining later due to option, if the customer wants to pick the remaining items later. Select Inventory Shortage or Customer Preference.
 - Select the Cancel Remaining option, if the customer wants to cancel the remaining items and select the reason for cancellation from the drop-down list.
 - Select the Shortage Resolution varies by line option and select the reason for cancellation for each line in the Shortage Resolution column.
8. Click Next. The Summary screen is displayed.
 - In the Item Picked panel, you can view the item description, ordered quantity and picked quantity.
 - In the Items not picked panel, you can view the item description, ordered quantity, shortage quantity and the shortage reason.
 - In the Items Cancelled panel, you can view the item description, ordered quantity, cancelled quantity and the cancellation reason.
9. Click the Previous button to revisit the previous screen.
10. Click Confirm.

Note: If configured, an acknowledgement receipt summarizing the customer picked items is printed.

3.17.5 Printing Pick Ticket

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

To print pick ticket:

1. From Tasks > In-Store Tasks, select Print Pick Ticket. The Print Pick Ticket screen is displayed.
2. In the Print Pick Tickets for panel, select the appropriate option.
 - Select All Shipments pending pick, to print pick ticket for all shipments for which pick ticket has not been printed.
 - Select All Shipments for Order # and enter the order number to print pick ticket of all shipments for that order.
 - Select the Search for Shipments to print pick tickets, to search for the shipments for which you want to print pick ticket. In the Shipment Search panel, enter the appropriate search criteria and click Search. The search results are displayed in the Search Results panel. Select the appropriate shipments for which you want to print pick ticket.
3. Click Print.
4. To reprint a pick ticket, select the Print Pick Ticket related task from the shipment details screen.

3.18 User Security

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

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

3.18.1 Changing Passwords

You can change your password in this screen.

To change your password:

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

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

3.18.2 Managing Users

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

Store administrators can search for users, change user credentials, or transfer users to another store. Sterling Call Center and Sterling Store does not allow users to modify their own credentials.

3.18.2.1 Searching for Users

You can search for a user and modify their credentials.

To search for a user:

1. From Tasks > User Security, select Manage Users. The Manage Users screen is displayed.
2. In the Search Users panel:
 - a. In Store, the store name is displayed.

- b. In User ID, enter the identifier of the user. You can either enter the complete identifier or a part of the identifier.
- c. In User Name, enter the name of the user whose status or group needs to be changed.

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


- d. In Status:
 - Choose Active, if the user is currently an active user.
 - Choose Inactive, if the user is currently an inactive user.
3. Click Search.
 - If only one user is found as a result of your search criteria, the Modifying User Details screen is displayed. For more information about modifying user credentials, see [Section 3.18.2.2, "Modifying User Credentials"](#).
 - If multiple users are found as a result of your search criteria, the search results display in the Search Result panel. You can view the user identifier, user name, and store details. Select the User ID whose credentials you want to modify and click Proceed.


3.18.2.2 Modifying User Credentials

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

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

To change user credentials:


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

- To unsubscribe the user from a user group, select the user group and click .
3. Click Confirm.

3.18.2.3 Transferring Users to a Store

You can transfer a selected user to another store.

To transfer the selected user to another store:

1. From Tasks > User Security, select Transfer Store. The Transfer Store screen is displayed.
2. In Transfer <name_of_the_user> to Store, enter the store name. If you want to search for a store, click . For more information about searching a store, see [Section 3.18.2.3.1, "Searching for a Store"](#).

Note: The user you are transferring must not belong to a Team that is specific to a store. If the user belongs to a Team, remove the user from the Team before transferring the user to a store.

3. Click Confirm.

3.18.2.3.1 Searching for a Store

You can search for different stores to transfer the users.

To search for a store:

1. In Store #, enter the store number, if applicable.
2. In Store Name, enter the complete store name or a part of the store name, if applicable.
3. In City, enter the complete city name or a part of the city name, if applicable.
4. In State, enter the complete state name or a part of the state name, if applicable.

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

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

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

3.19 Launching the IBM Sterling Business Center

Sterling Call Center and Sterling Store enables you to launch the Sterling Business Center application from within the Sterling Call Center and Sterling Store application. Sterling Business Center provides you with access to item and pricing configurations. For example, you may have to configure the pricing rules for an organization, or you may have to configure catalog entitlements.

You can launch Sterling Business Center from Sterling Call Center and Sterling Store only if you belong to a Sterling Call Center and Sterling Store user group that has the necessary permissions to access Sterling Business Center.

You can launch Sterling Business Center from the Quick Access screen of Sterling Call Center and Sterling Store. Navigate to Tasks, and select

Sterling Business Center. The Sterling Business Center home page is displayed.

Note: By default, the Related Tasks panel is hidden when Sterling Business Center is launched. To display the Related Tasks panel, click the Maximize icon that is located at the top right of the Sterling Business Center home page. To restore the original view of the Sterling Business Center home page, click the Restore icon.

For information about configuring items and pricing in Sterling Business Center, see the *Sterling Business Center: Pricing Administration Guide* and the *Sterling Business Center: Item Administration Guide*.

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