

# Application Overview For Users



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# Application Overview For Users

## **.1 Overview of Processes**

### **.1.1 Order Component**

For greater detail of the Sales Order process, see Section **3. Sales Order: Entry, Fulfillment and Returns**, below. For an explanation of all the fields, see the individual Manager Reference documents for **Accounting**, **Catalog**, **Facility**, **Order**, **Party**, and others. Since no business can survive without sales revenue, the Order Process is central to and supported (directly or indirectly) by all the Managers.

#### **.1.1.1 Order Process**

##### **.1.1.1.1 Order Created**

###### **.1.1.1.1.1 Triggers Authorization of Credit Card(s)**

All Payments Authorized or Received, or Assigned to Billing Accounts with sufficient credit or prepayment.

##### **.1.1.1.2 Order Accepted**

###### **.1.1.1.2.1 Approved**

If no approval workflow is desired, approval is automatic. If there is an established review to Approve each order, it is first only Accepted.

###### **.1.1.1.2.2 Accepted**

Triggers Approval Workflow (if applicable).

##### **.1.1.1.3 Order Approved**

##### **.1.1.1.4 Order Completed**

##### **.1.1.1.5 Order Cancelled**

### **.1.2 Product Component**

#### **.1.2.1 Facility and Warehouse Management**

##### **.1.2.1.1 Shipment Process (incoming and outgoing)**

###### **.1.2.1.1.1 Input**

###### **.1.2.1.1.2 Scheduled**

###### **.1.2.1.1.3 Picked**

###### **.1.2.1.1.4 Packed**

Triggers Invoice Creation

###### **.1.2.1.1.5 Shipped**

###### **.1.2.1.1.6 Delivered**

###### **.1.2.1.1.7 Canceled**

### **.1.3 Accounting Component**

## **.1.3.1 Payment and Invoice Process**

### **.1.3.1.1 Invoice Creation**

One or more invoices will be created for each order. The payment of the order is then associated with the invoice (when it comes in). When an invoice is created it can be assigned to a Billing Account to more easily track the invoices and payments for a customer (or a customer group). When an invoice is created it triggers capture of the payments via Credit Card(s) (if the order has indicates credit card payment associated with it).

## **.2 Role Oriented Overview**

### **.2.1 Customer Service**

#### **.2.1.1 Find Customer**

##### **.2.1.1.1 Use the Party Manager**

Find Customers (as well as employers, suppliers and, in general, parties of any type and in any role) using the Party Manager application. You will also find shortcuts to the Find Party function from various screens within many of the Managers to enable gathering or changing information about a party, whether Customer, Vendor, Employee, or whatever role the party might be in.

##### **.2.1.1.2 Reference document**

See the document - [Manager Reference: Party](#).

##### **.2.1.1.3 Go to the Party Manager**

The Party Manager is designed to administer information about Parties, including their identity, their roles, how to contact them, etc. Each party is given a specific Party ID which represents them as they interact within OfBiz. Groups of parties are recognized and assigned a Group ID.

###### **.2.1.1.3.1 What is a 'Party'?**

A 'Party' in Open For Business is a person or a group of parties, which can be persons or other party groups. Sometimes a party is described as a vendor, an employee, et cetera, but these are just 'roles' that a party may be associated with.

###### **.2.1.1.3.1.1 Roles and Contact Mechanisms**

One type of related data is Contact Mechanisms such as postal addresses, phone numbers, email addresses, internet URLs. Another is Roles that the Party acts in such as Customer, Supplier, Employee, Manager, Merchandiser, etc. Generally a single party will interact with different parts of the system in many different roles.

###### **.2.1.1.3.1.2 Communications and Agreements**

Another type of data that fits into the Party category is information about communication and agreements between Parties. This gets into the area of relationship management and also includes information about issues or trouble tickets that a Party may have. These entities are used along with the Work Effort entities to plan and track the research and resolution of such issues.

###### **.2.1.1.3.2 Use the Party Manager tab**

To get to the Party Manager while logged into any of the other OFBiz manager applications just click on the 'Party' tab near the top of the page.

##### **.2.1.1.4 Select the Find link**

'Find' is the default screen in the Party Manager.

##### **.2.1.1.5 Enter known information**

This includes information like Party ID, User Login, Last Name, First Name, Party Group Name, and Role Type.

###### **.2.1.1.5.1 Adding data focuses search**

The more information entered, the more specific will be the find. However, only one of the boxes need be completed to do a search. The search returns all Party IDs sharing the entered information. For example, if only 'Chicago' were entered under the City box, all Parties with a Chicago address are returned.

###### **.2.1.1.5.2 To expand your search ...**

Conversely, the less information entered, the broader the results. For example, if only two letters of a last name

is entered, all the Parties with the last name containing those letters will be returned.

### **.2.1.1.5.3 Show All Records**

Check this box to show all Party records, even if no search criteria are entered.

### **.2.1.1.6 Click on Lookup Party(s)**

Returns a table of all Party(s) found matching your input. If more than a screenful, you may need to scroll through the pages of results using the Previous and Next links.

#### **.2.1.1.6.1 Parties found**

The table of information for Parties found includes the Party ID #, User Login, Name, Type of party, and links to the [Details], [Orders], and [New Order].

### **.2.1.1.7 Select desired party**

Must click on one of the links.

#### **.2.1.1.7.1 Party # or Details**

##### **.2.1.1.7.1.1 Party Profile screen**

Takes you to the Party Profile screen from either of these links.

##### **.2.1.1.7.1.2 Continuity of selection**

Once a Party is selected, subsequent screen choices will be relative to the selected Party. If you wish to, for example, view the orders from another Party, first identify/specify the party before searching for orders.

#### **.2.1.1.7.2 Orders**

Takes you to the Order Manager and the Find Order(s) - (Order(s) Found screen, even if there are no orders existing. See Find Orders, below.

#### **.2.1.1.7.3 New Order**

Takes you to the Order Manager application, the first Order Entry screen, populating the Party ID box.

## **.2.1.2 Find Orders**

Both fulfilled and unfulfilled orders are found using the Order Manager application.

### **.2.1.2.1 Reference document**

See the document [Manager Reference: Order.](#)

### **.2.1.2.2 To return to the Find Orders page ...**

You can return to the Find Order(s) page at any time by clicking on the Find Orders header link.

### **.2.1.2.3 By Customer**

Once the Party (Customer) is found, a list is presented with a link labeled [Orders]; click on that to take you to the Order Manager with the selected customer's orders listed. See 'Find Customer,' above.

### **.2.1.2.4 Orders Created but needing Approval**

These instructions are for configurations where a workflow is used to manage the approval of placed orders, whether manual or automatic. For example, a pharmacy company may have a process like the following: an order clerk reviews orders and, if they look correct, passes them to a doctor. In turn, the doctor reviews the patient information and may contact the customer and when necessary issues a prescription and thereby approves the order. Most ecommerce situations are more simple than this and orders are automatically approved as long as payment is received or authorized.

#### **.2.1.2.4.1 Open the Order Manager**



## **.2.1.2.4.2 Select the Order List header link**

A list of Orders Needing Attention is presented. Purchase Orders To Be Scheduled will be listed with Order Number links and other information.

## **.2.1.2.4.3 Choose an Order from the List**

Takes you to the view order details page with information about the selected order.

## **.2.1.2.5 By Order Information**

### **.2.1.2.5.1 Open the Order Manager**

### **.2.1.2.5.2 Find Orders link**

The Find Orders screen works very much like the Find Parties screen. Enter what information you have (as little as possible to preclude errors) and the return screen presents all orders matching the data you entered.

### **.2.1.2.5.3 Click on Lookup Order(s)**

#### **.2.1.2.5.3.1 List of Orders Found**

All orders matching the parameters you entered are returned.

#### **.2.1.2.5.3.2 Links provided**

Links are provided on the Order ID or a View button which links to the view order detail page as described below. Also, a link is provided to the Party associated with the order.

### **.2.1.2.5.4 Choose from List Table**

Select the order you are seeking and click on either the Order ID number or the [View] link associated with that order.

## **.2.1.2.6 Order Detail Information and Available Changes**

### **.2.1.2.6.1 Order # XXXXX Information**

When a specific order number is selected, the full details of the order are returned on one screen. The top section includes the Status, the History of the order, and the date the order was placed.

### **.2.1.2.6.2 Payment Information**

Information here varies according to the method of payment.

#### **.2.1.2.6.2.1 Payment Method**

With PayPal, you can wait for the payment to clear before releasing the order.

##### **.2.1.2.6.2.1.1 PayPal and WorldPay**

PayPal is an online 'bank' that offers a payment transfer method that works with email accounts and allows customers to pay for their order against an account with funds held by PayPal, or against an established checking account, a debit card or a credit card. WorldPay works about the same.

##### **.2.1.2.6.2.1.2 Offline Payment (Receive Payment)**

Click on this link to the Order Manager's Receive Offline Payment(s) screen.

##### **.2.1.2.6.2.1.3 Invoice**

If the order is billed to a customer, the Invoice Number will appear in the payment information section.

##### **.2.1.2.6.2.1.4 Credit Card**

Credit card information is entered here.

##### **.2.1.2.6.2.1.5 EFT**

Electronic Funds Transfer information.

## .2.1.2.6.2.2 Invoices

Click on the Invoice Number and you are taken to the Accounting Manager - Invoices, with details of the invoice.

### .2.1.2.6.2.2.1 Multiple invoices

There can be multiple invoices associated with an order. This is especially true when the order is split into multiple shipments; there will typically be one invoice per shipment.

### .2.1.2.6.2.2.2 What triggers an Invoice?

In the default flow in OFBiz, the creation of invoices is triggered for the items in a shipment when that shipment goes into the 'Packed' status.

## **.2.1.2.6.3 Contact Information**

### .2.1.2.6.3.1 Name

Click on the ID # to be taken to the Party Manager - Profile page in a separate window.

### .2.1.2.6.3.2 Order Contact Mechanisms

All contact information associated with the order is listed here. Each item shows how it is related to the order; for example: billing address, shipping address, billing phone number, primary email address, etc.

#### .2.1.2.6.3.2.1 When contact is e-mail ...

If e-mail, click on the Send E-mail link to send a message.

## **.2.1.2.6.4 Shipment Information**

There is one set of shipment information for each 'shipment group' associated with the order. A shipment group is specified by the customer when the order is placed and allows them to specify different shipping destinations and/or shipment methods (carriers/services) for specific quantities from specific items in the order.

### .2.1.2.6.4.1 Shipments # (Link)

Click on the number to be taken to the Facility Manager - Shipments tab - View Shipments screen for the UserApplicationOverview actual shipment data.

### .2.1.2.6.4.2 Links

#### .2.1.2.6.4.2.1 New Shipment for Ship Group X

##### .2.1.2.6.4.2.1.1 >> Shipment creation page

This link is available for each ship group. Clicking on this brings you to the shipment creation page with the Order ID and the Ship Group Sequence ID filled in.

##### .2.1.2.6.4.2.1.2 Where it leads

From there just click Update to create the shipment, and go through the manual shipment process (issue/add order items to shipment, assign shipment items to packages, enter package info such as weight, enter routing/shipping info; then finally change the status).

#### .2.1.2.6.4.2.2 View/Edit Delivery Schedule Info

#### .2.1.2.6.4.2.3 Quick-Ship Entire Order

This creates a shipment for each ship group and origin facility (warehouse) that the order is associated with. Each shipment is then moved to the Packed status which causes invoices to be created, which in turn causes authorized credit cards to be captured if applicable, etc.

#### .2.1.2.6.4.2.4 Create Return

This brings you to a screen where you can create a Return, which can then be referenced to process the return when the actual goods are received.

##### .2.1.2.6.4.2.4.1 Is order complete?

Only appears if the order is in the Completed status.

### **.2.1.2.6.5 Order Items**

#### **.2.1.2.6.5.1 Cancel All Items**

An entire order can be canceled by clicking on this link.

#### **.2.1.2.6.5.2 Product**

##### **.2.1.2.6.5.2.1 Catalog**

[Catalog] link takes you (in a separate window) to the Catalog manager, Product tab, with details about the specific product ID.

##### **.2.1.2.6.5.2.2 ecommerce**

[ecommerce] link takes you (in a separate window) to the specific item ordered on the customer facing ecommerce site.

#### **.2.1.2.6.5.3 Status**

The status of each item in the order is given.

##### **.2.1.2.6.5.3.1 When is Status helpful?**

'Status' is useful because sometimes an item might no longer be available, or a customer might cancel a part of an order or, if the Split choice is Yes or there are multiple shipment groups, some items may have been sent while others are still pending.

#### **.2.1.2.6.5.4 Quantity**

Reports the quantity ordered, canceled, and remaining.

##### **.2.1.2.6.5.4.1 When is 'Quantity' useful?**

'Quantity' is useful because sometimes a customer might cancel a part of an order. If the Split choice is Yes or there are multiple shipment groups, some items may have been sent while others are still pending.

### **.2.1.2.7 Invoices**

Invoices are created as shipments associated with items in this order go into the Packed status. Regardless of payment method ALL orders will have invoices associated with them as they are fulfilled. All accounting information is managed through the invoice(s).

#### **.2.1.2.7.1 Invoices**

Click on this link to be taken to the related invoice in the Accounting Manager-View Invoices screen.

### **.2.1.2.8 Order Inventory Information**

#### **.2.1.2.8.1 Inventory reserved**

When an order is placed, the inventory needed to fulfill will be reserved. If there is not sufficient inventory available to promise and the store is setup to take the order anyway (a backorder) then negative reservations are done and the service to track and manage back-orders take effect.

#### **.2.1.2.8.2 Link to Facility Manager**

The Inventory number shown will link you back to the Facility Manager - Inventory Items screen with details about this particular inventory item.

### **.2.1.3 Create/Authorize Returns**

#### **.2.1.3.1 Create Return**

##### **.2.1.3.1.1 From Order**

Look under Shipment Information; if the order has met the pre-set criteria, a link will appear for [Create Return].

### .2.1.3.1.1.1 Create Return

This will take you to the Returns tab, the Return Items From Order # screen.

### **.2.1.3.1.2 From Returns tab**

#### .2.1.3.1.2.1 Enter available information

#### .2.1.3.1.2.2 Create New

##### .2.1.3.1.2.2.1 Return Header

New Return ID is generated.

##### .2.1.3.1.2.2.1.1 Additional information is requested

Complete the boxes with available information and select Update. Do not change Return Status to Approved without confirming its validity.

##### .2.1.3.1.2.2.2 Return Items

A table of order items that can be returned is displayed. Select the Order ID to bring up items for the correct order.

##### .2.1.3.1.2.2.2.1 Load Order Item(s)

##### .2.1.3.1.2.2.2.2 Receive Items

Takes you to the Facility Manager application, the Facilities tab, the Return screen.

### **.2.1.3.2 Find Existing Return**

#### **.2.1.3.2.1 From Order**

An Order report may show existing Returns already submitted against it. Click on the [Returns] link to view.

#### **.2.1.3.2.2 By Return ID**

##### .2.1.3.2.2.1 Enter the known Return ID.

##### .2.1.3.2.2.2 Lookup Return(s)

#### **.2.1.3.2.3 By Party ID, UserLogin ID or Billing Acct.**

##### .2.1.3.2.3.1 Enter known data

Under the Returns tab, enter the Party ID. All existing returns against this ID should be returned.

##### .2.1.3.2.3.2 To limit returns ...

Use the Status drop-down box and/or the Date filter to limit returns.

### **.2.1.3.3 Authorize Return**

Having found the return you have decided to accept, you will do the following:

#### **.2.1.3.3.1 Confirm and complete requested details**

#### **.2.1.3.3.2 Change the Status to Accepted.**

### **.2.1.4 Credits, Refunds, etc**

Credits and refunds are reflected in three or four places: the Return, the related Order, the related Invoice, and the customer's Account.

#### **.2.1.4.1 Returns**

### **.2.1.4.1.1 Documentation needed**

Before a customer can be credited for a return or a refund, product needs to be returned or a service paid for but not fulfilled needs to be documented.

### **.2.1.4.1.2 System entries**

A properly executed Return, duly authorized, matched by a statement of Receipt from the receiving facility, needs be entered into the system.

### **.2.1.4.2 Orders**

The numbered Order reflects the history of items returned and adjustments made. If properly performed, all Credits and Refunds against an existing Order will be shown when that Order is viewed.

### **.2.1.4.3 Invoices**

### **.2.1.4.4 Customer Accounts**

If an account exists for a customer, it can be viewed under the Accounting Manager - Billing Accounts tab. All changes to the Account will be visible at the Invoices or the Payments tab under the Billing Accounts.

## **.2.1.5 Customer (Party) Communication**

### **.2.1.5.1 Communication Events**

Events are created in the WorkEffort Manager.

#### **.2.1.5.1.1 Calendar**

##### **.2.1.5.1.1.1 Add events**

Click on the [Create New] associated with each day or hour to add an event to your calendar.

##### **.2.1.5.1.1.2 Display events**

All created Events, including Projects and Requests, are displayed at the scheduled date/time on the Calendar associated with the affected Party or Group.

##### **.2.1.5.1.1.3 Create Events for others**

At the Calendar, you can create new Events for other Parties or Groups using the [New Event] link.

#### **.2.1.5.1.2 Projects**

##### **.2.1.5.1.2.1 Projects displayed**

The Projects tab under the WorkEffort Manager displays first all current and pending projects.

##### **.2.1.5.1.2.2 Create new Projects**

Click on the [New Project] link to bring up the screen for a new project. Fill in the detail and then click on [Create]. When you have created the Project, you can [Edit] the Project to assign others to it. These assignments should reflect in their Calendar.

#### **.2.1.5.1.3 Requests**

Create a Request under the WorkEffort manager - Requests tab.

### **.2.1.5.2 Notes**

Notes can be added to almost any document created including Orders, Work Orders, Shipping, Invoices, Calendars, Projects, etc.

#### **.2.1.5.2.1 Remain until deleted**

Once a note is entered, it stays with that document until specifically deleted.

## **.2.1.5.3 Contacts**

### **.2.1.5.3.1 Party**

A Party is any entity: individual, group, company, department, facility, vendor, or it could be a recognized group of parties - a union, association, etc.

#### **.2.1.5.3.1.1 Contact a Party**

A Party can be contacted through whatever means they establish as preferred: e-mail, postal mail, telephone, fax, electronic, etc.

#### **.2.1.5.3.1.2 Party ID is Unique**

A Party is assigned a unique Party ID which brings together the known and recorded characteristics of that Party.

#### **.2.1.5.3.1.3 Contact mechanism**

Each Party has some form of a Contact Mechanism, or several forms, through which the business or other Parties can reach it.

#### **.2.1.5.3.1.4 Party Manager - Profile screen**

Use the Party Manager - Profile screen to view the details of a Party or to make changes to the Contact Information information.

### **.2.1.5.3.2 Group**

A Party Group is a collection or affiliation of Parties to which an ID and a name is assigned. The Group has Contact Mechanisms just as individual parties: electronic address, postal, phone, e-mail, etc.

### **.2.1.5.3.3 Role**

Relationships between individuals and groups are defined by their Role.

#### **.2.1.5.3.3.1 Role may determine response**

Mechanisms can be set up to respond differently to an individual based upon his Role in the transaction. For example, a Customer Role for the Party will be processed differently than an Order Taker Role for the same Party. Likewise, a Vendor could also be a Customer.

#### **.2.1.5.3.3.2 Consider your Role when contacting**

Contacting Parties or Groups should always consider the Role under which they will receive the contact.

### **.2.1.5.3.4 Comm**

The Comm tab under the Party Manager application lists all pending Communications events for the party LogIn ID currently using the application.

#### **.2.1.5.3.4.1 Each Event is numbered**

#### **.2.1.5.3.4.2 Party From ID**

Click on the [Party From ID] to be taken to a Profile of the other Party.

#### **.2.1.5.3.4.3 View**

Click on the [View] link to see details of the Event.

## **.2.1.6 Finding Product Information**

### **.2.1.6.1 From Catalog Manager**

#### **.2.1.6.1.1 Select Catalog Manager - Main Tab**

#### **.2.1.6.1.2 Use Catalog Search tools**

### .2.1.6.1.2.1 Search

Search by keywords, product ID, or category.

### .2.1.6.1.2.2 Select

Click on the product ID to be taken to the product information.

## **.2.1.6.2 From Order**

On the order page, click on any product ID to be taken to the associated product information page.

## **.2.1.6.3 From Shipping Document**

Whenever a Product is given in a Shipping Document, the listing itself is a link to the product information sheet. Click on the name or the ID number to be taken there. This enables quick determination whether the product being packaged or loaded is exactly what was ordered and allows shippers to determine special shipping needs, etc.

## **.2.1.7 Finding Product Inventory Information**

### **.2.1.7.1 Through Catalog Manager - Product ID**

#### **.2.1.7.1.1 Enter Product ID**

#### **.2.1.7.1.2 Go to Edit Product Page**

#### **.2.1.7.1.3 Click on Inventory tab-button.**

### **.2.1.7.2 Through Facility Manager - Facilities**

#### **.2.1.7.2.1 Select Inventory Items tab**

Look through the Product ID column to find the one you seek.

## **.2.1.8 Creating Sales Orders**

The process for Sales Orders and for Purchase Orders is different. See Creating Purchase Orders, below, for the steps in entering a Purchase Order sale.

### **.2.1.8.1 Identify Party**

If you already have the customer ID or customer login, you can proceed directly to the Order Manager - New Order screen.

#### **.2.1.8.1.1 Open Party Manager**

#### **.2.1.8.1.2 Enter known information**

#### **.2.1.8.1.3 Lookup Party**

Click on [Lookup Party].

#### **.2.1.8.1.4 New Order**

Click on the [New Order] link to be taken directly to the Order Manager.

### **.2.1.8.2 Order Manager - Order Entry tab**

#### **.2.1.8.2.1 Select the Sales Order button.**

The order entry process is different for Purchase Orders than from Sales Orders:<p>1. A purchase order is made by an established customer, usually in a business-to-business (B2B) relationship. <p>2. Agreements will be in place regarding many of the details which would have to be obtained from a sales order customer. <p>If this is a Purchase Order, see the Purchase Order section below.

### **.2.1.8.2.2 Select the Product Store**

From the drop-down box, locate and select the store from which the order will be processed. This is a mandatory step.

### **.2.1.8.2.3 Identify the Sales Channel which brought in the order.**

How did the order arrive? Was this called in, mailed in, brought in by a salesperson, is it an e-commerce sale, is the customer present in your store? These possible sales channels are presented by the drop-down box.

### **.2.1.8.2.4 Identify the customer.**

Complete either the UserLogin ID or the Party ID for the customer if not already populated. Enter only one or the other. If the ID is not known, return to the Party Manager and either find or create an ID for the customer.

<p>Note: Unless the customer has login privileges, they will probably be identified only by a Party ID.

### **.2.1.8.2.5 Continue into the order process.**

Click on the [Continue] button; this will bring up the next screen if you have completed the preceding steps.

## **.2.1.8.3 Create Sales Order - initial screen appears.**

This is where you begin to enter the Product IDs for the order. Note that the screens and the process is a little different here than in the E-Commerce order processing screens.

### **.2.1.8.3.1 Confirm the Party ID**

Before proceeding with the order, be sure that the correct Party and PartyID are presented here. If not, click on the [Change] button to bring up a screen for selecting the correct Party.

### **.2.1.8.3.2 Enter order items**

Enter the Product ID (if known), Quantity, Desired Delivery Date, and any Comments. <p>NOTE: Entry is case sensitive.

#### **.2.1.8.3.2.1 Add any Promotion/Coupon Codes.**

Enter any known Promotion or Coupon codes, then click on [Add Code].

#### **.2.1.8.3.2.2 Catalog links**

Click on the Catalog links to bring up products by category.

##### **.2.1.8.3.2.2.1 Select your choices**

Select from those choices presented; your selections are added to your order.

##### **.2.1.8.3.2.2.2 View a running summary**

A running summary of things ordered appears; it includes promotional items which are added free.

#### **.2.1.8.3.2.3 Add item to the order.**

Click on Add To Order. Details of the ordered item now appear in the Order Items section, including the name of the item, desired delivery date, price of item, and adjustments from existing promotions or discounts. Opportunities for adjustments also appear.

## **.2.1.8.4 Add any additional items.**

Repeat the process for each of the desired items.

## **.2.1.8.5 Confirm the items**

## **.2.1.8.6 Finalize Order**

Click on [Finalize Order].

### **.2.1.8.6.1 Confirm the Ship-To address.**

If the address is correct, click on [Continue]; else click on [Update].



### **.2.1.8.6.2 Order Option settings.**

Complete the shipping choices, fill in the details as needed, then click on [Continue].

### **.2.1.8.6.3 Order Entry Payment settings.**

Select the radio button that corresponds with the intended payment method. Click on [Continue]. Order Entry Payment screen will appear in which to complete the billing details.

## **.2.1.9 Create Purchase Order**

### **.2.1.9.1 Complete Order Type**

The order entry process is different for Purchase Orders or for Sales Orders:<p>1. A purchase order is made to an established provider, usually in a business-to-business (B2B) relationship. <p>2. Agreements will be in place regarding many of the details which would have to be obtained from a sales order customer. <p>3. Payment methods are already determined for the purchase order provider. <p>These PO details must be in place through entries made in the Party Manager and the Accounting Manager before order entry can begin on a Purchase Order.

### **.2.1.9.2 Purchase Order Entry - Initial Screen**

This screen confirms the party for the order, gives you the chance to change the party, and a place to set a currency for the order if different from the default. <p>NOTE: To move forward from this screen through the order entry process, you must click on the [Select One] link.

### **.2.1.9.3 Complete Product Store fields**

#### **.2.1.9.3.1 Product Store field**

Sales Orders require Product Store field to be complete; Purchase Orders do not.

#### **.2.1.9.3.2 Party ID**

Party ID should be automatically populated. If you went directly to Order Manager - Order Entry, you will need to enter either the UserLogin ID or the Party ID.

### **.2.1.10 Future Items:**

#### **.2.1.10.1 Possibly added in Future**

Requests, Quotes, Call Center, Scheduling, etc.

## **.2.2 Warehouse and Order Management**

### **.2.2.1 Receive Purchase Orders**

#### **.2.2.1.1 Go to Facility Manager - Facilities tab**

#### **.2.2.1.2 Select Inventory Receive**

#### **.2.2.1.3 Enter Purchase Order Number**

#### **.2.2.1.4 Receive Product(s)**

Click on [Receive Product(s)].

### **.2.2.2 Receive Inventory - product specific**

#### **.2.2.2.1 Go to Facility Manager - Facilities tab**

#### **.2.2.2.2 Select (Inventory Receive)**

Although labeled Receive Inventory, this screen is actually a filter to determine whether you are processing a Purchase Order or the receipt of a specific Product ID. In this case you are not receiving a PO, so only the ProductID is completed.

### **.2.2.2.3 Enter ProductID**

### **.2.2.2.4 Receive Products**

Brings up the Receive Inventory screen. This screen is product-specific and tells where the product is to be located. Complete the boxes before clicking on [Receive].

### **.2.2.2.5 Click on (Receive)**

When inventory receipt is accepted, you are returned to the Receive Inventory.

### **.2.2.2.6 Item ID**

Note that when an item is received, it is assigned an Item ID which governs its movement rather than the ProductID. There will probably several different Item IDs with the same product with them.

## **.2.2.3 Receive Other Shipments**

### **.2.2.3.1 Go to Facility Manager - Facilities tab**

### **.2.2.3.2 Select (Shipments) tab**

### **.2.2.3.3 Enter known data**

### **.2.2.3.4 Click on (Lookup Shipment(s))**

If more than one shipment returned in a list, select the one you need to work with. Then you will be taken to the same ViewShipment screen.

### **.2.2.3.5 Route Segments**

This is a working sub-screen where arrangements are entered for movement of a shipment by route segments.

## **.2.2.4 Receive Returns (Creating Returns)**

### **.2.2.4.1 Notes:**

<ul><li> All Returns must be 'created' in the Order manager before they can be received. </li> <li> The Return ID is the essential item for any return. </li> <li> When the Return is created, there is a link on the Returns page labeled [Receive Return] which takes you to the Facility Manager for processing the return. </li></ul>

### **.2.2.4.2 Go to Facility Manager - Facilities List**

### **.2.2.4.3 Select Facility**

Click on the ID for the facility which will receive the return.

### **.2.2.4.4 Click on (Receive Return)**

### **.2.2.4.5 Enter Return ID number**

### **.2.2.4.6 Click on (Receive Product(s))**

## **.2.2.5 Inventory Transfers**

### **.2.2.5.1 Go to Facility Manager**

### **.2.2.5.2 Click on Main tab**

Brings up the Facilities List.

### **.2.2.5.3 Click on (Facility Name)**

Takes you to the Facilities tab, the Facility screen for the selected facility.

### **.2.2.5.4 Click on Inventory Xfers tab**

Brings up an Inventory Transfers for (named facility) with three choices: [New Facility], [Active and Inactive], or [Inventory Transfer].

### **.2.2.5.5 Click on (Inventory Transfer)**

Takes you to the Inventory Transfer screen where you are asked to enter the Inventory Item ID. If you do not have the ID number, click on Inventory Items tab where you can identify and select the Item ID then move to the Inventory Transfer screen.

### **.2.2.5.6 Enter Inventory Item ID**

### **.2.2.5.7 Click on (Get Item)**

Takes you to the Inventory Transfer screen. Here you will complete various details to move the inventory, in the desired quantity, to the required location on the appropriate date.

### **.2.2.5.8 Click (Transfer) to complete**

## **.2.2.6 Physical Inventory Adjustments**

Use this to account for errors, damages, losses, expired shelf life, overstocking, etc.

### **.2.2.6.1 Go to Facility Manager**

### **.2.2.6.2 Go to Inventory Items tab**

### **.2.2.6.3 In table, click (Edit)**

#### **.2.2.6.3.1 Inventory Items detail screen.**

This will take you to the Inventory Items detail screen. At the bottom of the screen is Physical Inventory Variances. Use this tool to make adjustments to inventory.

#### **.2.2.6.3.2 To relocate existing inventory ...**

If you only need to relocate existing inventory, click on [Transfer] to bring up the screen for moving inventory.

## **.2.2.7 Stock Moves**

For Bulk and Pick/Primary Locations.

### **.2.2.7.1 Go to Facility Manager**

### **.2.2.7.2 Go to Facilities tab**

### **.2.2.7.3 From Facilities List choose facility**

### **.2.2.7.4 Click on (Picking)**

This page will show statistics about orders that are ready to be picked, and orders that need stock moves before they can be picked.

### **.2.2.7.5 Click on (Stock Moves)**

There are two quantities taken into account when determining the stock moves to recommend. The first is inventory in bulk locations that have been reserved for sales orders, and the second is the inventory quantity settings for each product in each inventory/facility location.

### **.2.2.8 Order Picking (Batched)**

For Bulk and Pick/Primary Locations.

#### **.2.2.8.1 Go to Facility Manager**

#### **.2.2.8.2 Go to Facilities tab**

#### **.2.2.8.3 From Facilities List choose Facility**

#### **.2.2.8.4 Click on the (Picking) tab-button**

#### **.2.2.8.5 Do stock moves if any needed**

#### **.2.2.8.6 Generate Pick Report**

##### **.2.2.8.6.1 Notes**

- When generating the pick report you can mark inventory reservations as being picked to avoid duplicate picking.
- To see the picks in progress, click on the [picks in progress] link.
- On the Picks in Progress page you will be able to cancel the picking of specific items, orders, and groups of orders which will make them available for picking again.

##### **.2.2.8.6.2 Pick Report**

The Pick Report has two sections: one for picking, and the other for packing or organizing the items on a cart.  

- The picking section is organized by facility locations to facilitate picking of the entire group of orders through one pass of the warehouse. Each location shows the product(s) to be picked from that location, and the order or shipment they will be packed with.
- The second section has one page for each order (or shipment group of an order) that lists what is to be included with it. This can be used to organize a picking cart and shows information about what is included in the order or ship group.

### **.2.2.9 Packing and Shipping**

#### **.2.2.9.1 Quick Ship**

##### **.2.2.9.1.1 Go to Facility Manager**

##### **.2.2.9.1.2 Go to Shipments tab**

##### **.2.2.9.1.3 Click on (Quick Ship Order)**

##### **.2.2.9.1.4 Enter Shipment ID**

##### **.2.2.9.1.5 Click on (Ship Order)**

#### **.2.2.9.2 Detailed Shipment Creation**

##### **.2.2.9.2.1 Go to Facility Manager**

##### **.2.2.9.2.2 Go to Shipments tab**

##### **.2.2.9.2.3 Click on (New Shipment)**

##### **.2.2.9.2.4 Enter Shipment Type**

### **.2.2.9.2.5 Enter Status**

### **.2.2.9.2.6 Enter Primary Order ID**

### **.2.2.9.2.7 Click on Update**

#### **.2.2.9.2.7.1 Known information**

Screen will populate with known information from the original order.

#### **.2.2.9.2.7.2 Other tabs**

Proceed to the other tabs as needed to complete preparations and fulfill the order.

## **.2.2.9.3 UPS Services**

### **.2.2.9.3.1 UPS agreement in place?**

Contingent with having a working agreement with UPS.

### **.2.2.9.3.2 Note Pre-requisite**

First complete Detailed Shipment Creation, above.

### **.2.2.9.3.3 Purpose**

Purpose is to exchange information with UPS, determine exact costs and, if agreeable, to get shipping labels and schedule pickups.

### **.2.2.9.3.4 Click on Route Segments**

### **.2.2.9.3.5 Complete as needed.**

### **.2.2.9.3.6 Click on confirmation link**

[Confirm Shipment with UPS]

## **.2.3 Product Information Management**

### **.2.3.1 Working with Catalogs**

#### **.2.3.1.1 Working with Catalogs**

To follow this topic, click on the 'Catalog Detail List' in the left-hand panel under the 'Browse Catalogs' section. Then click on any catalog in the table of current catalogs presented in the main screen. You will see the top-level editing screen for that catalog. Along the top of the working screen are four sub-tabs: Catalog, Stores, Parties and Catalogs. Each of those are discussed as a topic below.

#### **.2.3.1.2 Catalogs in general**

A product catalog is used to group many product categories together and forms an intermediate step in the organization between products, categories, and stores. The product catalog can be used to define a common look and feel for all categories in this catalog and specify the way different categories will behave. For example, it is very useful for stores which sell products from different manufacturer or completely different product types that require differing presentations to the customer.

#### **.2.3.1.3 Catalog tab**

The main Catalog tab for a product catalog is mostly for establishing the look and feel. Each catalog can have its own style sheet (CSS), its own logo, and its own content repository (the content path prefix) and templates prefix (where its freemarker templates are located).

#### **.2.3.1.4 The Stores tab**

The 'Stores' tab shows a list of Stores that this Catalog is currently featured in. Note that Stores and Catalogs do

not have a one-to-one relationship: the same Store can feature multiple Catalogs, and the same Catalog could be featured in many Stores.

### **.2.3.1.5 The Parties tab**

Here you identify which Party is responsible for or assigned to work with the specific Catalog selected. The Party's Role is assigned or identified and, if appropriate, a start and/or finish date for the assignment can be specified.

### **.2.3.1.6 Categories tab**

The 'categories' tab shows the different product categories and their roles for this catalog. Specifically:

- Each catalog can (should) have a 'Browse Root' category, which is used as the root category for navigation. For example, the navigation menu would start at this category and show its child categories.
- Each catalog can also have a 'Promotions' category, which is shown first to the customer when he signs in to the site.
- There is also a 'Default Search' category. Products in this category are used for search results first.
- 'Quick add' categories are used to specify categories where products can be added in bulk to the cart from the same screen.

## **.2.3.2 Browse Categories links**

In the left-hand panel is a section labeled 'Browse Categories.' You can click on one of the -indented- categories to begin editing it directly, or click on the [Choose Top Category] link to view a list of links to all Parent categories.

## **.2.3.3 Catalog Administration Main Page**

The catalog administration main page has several small menus for finding catalogs, categories, or products. The first three menus allow you to edit catalogs, categories, or products by their respective IDs, or create new catalogs, categories, or products. The last one allows you to look for a product using an ID other than its product ID, such as upc or isbn number (see below.) Under these menus are two more links. [Auto create keywords] and [Fast load catalog into cache].

### **.2.3.3.1 Auto create keywords**

[Auto create keywords] will create keywords for all of the products identified with the current Catalog. The keywords are based on product descriptions and are used for searching for products.

### **.2.3.3.2 Fast load catalog**

[Fast load catalog into cache] will load all products and product categories into the cache; this is good for improved application performance. Note that only basic product and category information from the first Product and Category tabs is loaded, so additional information such as content, associations, and pricing will still have to be retrieved from the database and cached later by the applications.

## **.2.3.4 Sequence from a Store to the Products**

Although the process sequence through the tabs discussed below does not correspond with the tab layout within the Catalog Manager, the progression of the steps is intentional. Promotions and Price Rules cannot exist without Products. Products are usually so numerous that you wish to divide them into Categories and distinguish them by their Features. Categories are then the major sections of your Catalogs. And Catalogs must be associated with their related Stores. Therefore, when setting up your business, you need to start with the Store. All of these details are handled within the Catalog Manager.

## **.2.3.5 Stores**

A product store has all the information needed to sell products. It is composed of a series of catalogs, which are composed of product categories and products. Each store can have its own shipping, fulfillment, notification, promotions, payment processing, and tax calculation policies. A product store can point to several different websites, allowing the same products to be sold on multiple hosted sites or domains. Alternatively, multiple stores, each with their own website, can be set up to allow different pricing and fulfillment procedures for, say, different countries or different market segments (wholesale versus retail.)

### **.2.3.5.1 Go to Catalog Manager**

### **.2.3.5.2 Go to Catalog Manager - Stores tab**

Stores tab (with a store selected) brings up Roles, Promos, Catalogs, Web Sites, Sales Tax, Shipping, Payments, Emails, Surveys, and Override tabs to perform a host of other store-related functions.

### **.2.3.5.3 Select existing store**

#### **.2.3.5.3.1 If none, Create New Product Store**

#### **.2.3.5.3.2 Complete fields**

#### **.2.3.5.3.3 Click on Update**

### **.2.3.5.4 Working with Product Stores**

When you click on 'Stores,' you will see a list of product stores that have been defined. Click on one and you will see several tabs for administering different aspects of that store. Some of those aspects are discussed below.

#### **.2.3.5.4.1 Why use stores?**

The 'Stores' tab in the catalog manager as used to define all the properties of a working store, is a group of products sold together under the same policies. Stores greatly improve the flexibility of Open for business applications. It is possible for a company to set up multiple stores, each with its warehouses, fulfillment policies, currencies, languages, promotions, and look-and-feel. These stores can be web-based b2b or consumer ecommerce stores or for internal order entry and POS applications. They could even be in different countries with different shipping and taxation rules.

#### **.2.3.5.4.2 Product Store**

This very complete screen provides entry for all of the myriad choices available which define the store and establish parameters.

#### **.2.3.5.4.3 Roles**

Defines parties with specific roles for this store. For an employee to be able to take orders using the internal order manager application, he must be defined as a 'Sales Representative' here. Restrictions are enforced through the Party Manager - SecurityGroupsList which grants rights according to party roles.

#### **.2.3.5.4.4 Promos**

Shows a list of active promotions for this store.

#### **.2.3.5.4.5 Catalogs**

Catalogs which are available for the current store and the sequence in which they are to be shown to the user in a navigation menu.

#### **.2.3.5.4.6 Web Sites**

Websites which are related to this store. This is directly used to link a store to a web application. Each web application has a configuration file called web.xml, and it is defined to reference a particular web site. The web site in turn is defined to relate to a product store. Thus, by setting a store on a web site, it becomes 'live' on that web application. NOTE: It is possible for a web application to have more than one store associated with it, as long as the application knows how to use the correct one.

#### **.2.3.5.4.7 Shipping**

This page shows the shipping options available to store customers. A list of shipping options and their pricing is shown. Click on View for a shipping option shows all the settings for this shipping option. At this point, this tab can only view shipping options available and can not be used to define them.

#### **.2.3.5.4.8 Payments**

This is used to set up payment processing for the store. The payment processing interfaces are defined as Open for business services. Each payment method will have a series of service types available to it, such as for authorizing, capturing, and refunding payment. This page links the payment types and the services together by their purpose. Thus, one service would be used for credit card authorizations, another for credit card capture, and so forth

### **.2.3.5.4.9 EMails**

This defines emails which the store would send to customers. The actual email services are either mounted in the controller, such as the order confirmation email, or from scheduled services, such as back order notifications. This page defines where the template for the email is located on the file system, the addresses and subject of each email, and a content type (which can be left blank).

### **.2.3.5.4.10 Surveys**

This page is for adding surveys to the store. Surveys can be associated with certain events or with products and categories.

### **.2.3.5.4.11 Override**

Allows certain keywords to be ascendant at this store for a particular time period.

### **.2.3.5.4.12 Segments**

Identifies the Sales or Market Segments targeted for this Store. The actual assignment is made under the Marketing tab > Segment sub-tab. Here under the Product Store you will see a summary table of those assignments along with links to make any additions or changes.

## **.2.3.6 Catalogs**

Catalogs are an added layer of grouping in Open for Business, useful for grouping many categories together. Catalogs are composed of many categories. See the topic 'Working with catalogs' above.

## **.2.3.7 Categories**

A category is a group of usually similar products which are presented together for the customer's convenience. A category can have both products and other sub categories and can have its own descriptions and images.

### **.2.3.7.1 Why have categories?**

Categories provide navigation for the site and containers for the products. If a product is not in a category then it will not appear in the search.

### **.2.3.7.2 What categories are needed?**

As a minimum you will need to add a browse root and a promotions category. The browse root forms the top level of the site and this is what the other categories that you create will 'hang' off. The promotions category is for special offers and is the front page of a site by default. There are other categories available which can be used for specialist functions like search etc. The catalog is assigned a category, and categories are assigned to a catalog with a 'type' of assignment, i.e., browse root, promotions, etc. In addition you will want to add your own categories to represent different 'Departments' in the store.

### **.2.3.7.3 Main category page**

Once you click on a category on the left navigation menus, or enter a category ID to edit or create a new category, you will be first taken to the main category page. This page shows the categoryId which identifies this particular category, the type of the category, some content information associated with the category, and a primary parent category for this category.

### **.2.3.7.4 Category Type**

The category type is used to define what actions are available for the category: 

- Catalog – standard product catalog category, with descriptive information and products.
- Quick Add – products on these categories can be added all at once

### **.2.3.7.5 Detail template**

The detail template is used to define the path of a freemarker template, relative to the ecommerce application component, used for displaying this category's information to visitors. This allows different product categories to have completely different presentations and is a very helpful feature.

### **.2.3.7.6 Primary category**



The primary parent category defines the primary parent of a category. Note that this will not automatically add the current category as a child of the parent category — that has to be done in the 'Rollup' tab. It seems that the information provided here is not currently used by Open for Business applications, but it is available for your own applications.

### **.2.3.7.7 (Category) Content**

The content tab is used to associate content created and managed by the content management application with product categories. The page is intentionally very similar to the content tab for products. Currently, only description and long description are managed in the content tab, but, conceivably, at some point images and other descriptive information will be available here as well.

### **.2.3.7.8 Rollup**

Category 'rollups' are used to define parent/child relationships between product categories. This screen is split between 'parent' and 'child' categories. For example, if you have categories of Clothing, Men's Clothing, and Suits, then Clothing would be in the parent section of Men's Clothing, and Suits would be in the child section. The 'sequence' field is a sequence number which can be used to order the child categories for display.

### **.2.3.7.9 (Category) Products**

This tab will show all the products which are members of this category. Each product is identified by its product ID, and you can click on the product ID to go to this product. The sequence number is used for ordering the products for display.

### **.2.3.7.10 (Category) Catalogs**

This tab shows what product catalogs this category is related to. For most product categories, this page should be blank, as only a few categories should be related to product catalogs.

## **.2.3.8 Features**

### **.2.3.8.1 To Sell and to Differentiate Products**

Features are characteristics used to sell and to differentiate products. The Open for Business catalog manager allows you to define any feature set you wish for your products. Typical features include size and color. In Open for Business, features are associated, or applied, to products as Standard Features, Selectable Features, or Distinguishing Features.

#### **.2.3.8.1.1 Standard features**

Standard features are features which are associated with every instance of a product. An example might be the brand name of a product -- all instances of the product share the same brand name.

#### **.2.3.8.1.2 Selectable features**

Selectable features are features which the customer selects one from many available choices. For example, a shirt may be available in White, Blue, Green, Yellow, Pink. These colors would be selectable features of the variant product shirt, and the customer would be prompted to choose a color. Each color, though, would be a standard feature of the physical product. Thus, White would be a selectable feature of the virtual product 'shirt' but a standard feature of 'white shirt.'

#### **.2.3.8.1.3 Distinguishing features**

Distinguishing features are features which distinguish one product from another and are used to show the customer which item she chose.

### **.2.3.8.2 Working with Product Features**

#### **.2.3.8.2.1 Click on Features tab**

Defaults to Product Features

##### **.2.3.8.2.1.1 Create and Maintain Product Features**

These screens are for creating and maintaining product features, which are features or characteristics that are

available for products. Here you will define what features can be available for products. Later, when working with the products, you will have a chance to define what features a particular product may have.

### .2.3.8.2.1.2 Feature Categories and Feature Groups

Notice the sub-tabs for Feature Categories and Feature Groups. These are both used to help you organize your product features. Each feature can only belong to one category but as many groups as you need. For example, you can have a colors category that has colors White, Blue, Grey, Green, Yellow, Pink, Red, and Orange and a sizes category that has sizes XXS, XS, S, M, L, XL, XXL. Then, you can have one group for shirts that would have colors White, Blue, Grey and sizes S, M, L, XL, XXL, and another group for dresses that have colors Yellow, Pink, Red, Orange and sizes XXS, XS, S, M, and L.

### .2.3.8.2.1.3 Add Features to a Category

Once you have created a feature category, you can click on it to add features to it. There is a link [Create new feature] which takes you to a screen to create a new product feature. Below this link is a list of product features already in this category. Important fields for product features are listed below.

### .2.3.8.2.1.4 Feature Categories

Click on [Feature Categories] (this is the default screen when you clicked on 'Features' above), and you will see a menu for editing a particular feature, if you remember its feature ID. (If not, you can edit it from the feature categories below.) Next, you will see a list of feature categories and their parent categories. The categories' ID codes are highlighted, and you can click on one to go to the feature category. At the very bottom is a menu for creating a new feature category. Here, you would enter the new feature category's name and specify a parent category for it (if it has one.) The category ID is automatically created for you.

## **.2.3.8.2.2 Working with Feature Groups**

Click on [Feature Groups] and you will see a screen showing a list of available feature groups, and an option to create a new feature group at the bottom. Click on the ID of the feature group, and you will be taken to a screen which shows all the features in this group (if there are any) and a menu to add more features to this group. Like feature categories, the IDs of feature groups are automatically created.

## **.2.3.9 Products**

### **.2.3.9.1 What are 'Products'?**

Products are items which are available for sale. They can have names, descriptions, pictures, and prices associated with them. There are several major types of products: 

- Digital goods, such as downloadable music or movies, which do not require tracking inventory.
- Physical items, such as books or medium white shirts, that could require tracking inventory.
- Virtual items, such as a shirt. They are NOT counted in inventory.
- Stand-Alone Products are products existing as an identifiable item, not the master virtual 'shirt' with various sizes and colors. They are counted in inventory.

#### **.2.3.9.1.1 Note on Virtual Products**

A shirt is not a physical item in the sense that one does not actually buy or sell a shirt — one buys medium shirts in white, large shirts in blue, and so forth. Virtual items such as 'a shirt' point to any number of physical items that are bought and sold and make it easier to organize products for sale. For example, instead of showing the customer a laundry list of all possible sizes and colors of shirts, we can show the customer a shirt item and ask her to choose the size and color she wants. Then we add that particular shirt to her order. Virtual items do not have any inventory associated with them.

### **.2.3.9.2 Next set of Tabs**

Once you have selected a product to edit or have selected to create a new product, you will see a series of tabs: Product, Prices, Content, IDs, Categories, Keywords, Associations, Attributes, Features, Facilities, Locations, Inventory, Suppliers, Accounts.

### **.2.3.9.3 Duplicating products**

At the bottom of the main Product tab is a small menu for duplicating products. This is a very useful feature when creating a lot of products with similar characteristics. Enter a new product ID here, and the catalog manager would take the current product and create a copy of it with the new product ID.

### **.2.3.9.3.1 Options with Duplicate Products**

There are two rows of options below the product ID, one starting with 'Duplicate' and one with 'Remove.' A click on a box next to an option will cause the selected characteristics of products to be duplicated as well. For example: 

- Click on the box to the right of 'Prices' and the product will be duplicated with all the same price data as the original.
- Click on a box next to an option in the 'Remove' row and that characteristic of the original product will not be in the new product when created.

### **.2.3.9.4 Virtual and Variant Products**

A virtual product, as described above, is a product which has several selectable features, each of which resolves to an actual product. A virtual product cannot be added to a shopping cart or order. If a product is defined as a variant, services such as those for calculating product pricing will look to the parent product.

### **.2.3.9.5 Pricing**

#### **.2.3.9.5.1 Flexible Pricing Model**

Open for Business has an extremely flexible product pricing model that is based on a combination of data and rules. The most basic information is maintained under the 'Price' tab for a product. Here, one can enter Default Price, List Price, Promotional Price, Average Cost of a product.

#### **.2.3.9.5.2 Required Prices**

The only REQUIRED prices are List Price and Default Price. You could have a price at which it is bought (Average Cost) and a price at which it is sold (List Price). List price can be used as Suggested Retail price and Default price would be the price which you will sell it for (by default).

#### **.2.3.9.5.3 Price Information and Actual Prices**

Each piece of price information specifies what type of price it is (List Price, Promotional Price, Average Cost); the currency it is in; the product store group it belongs to; and the from and through dates of this price. Once Open for Business has all the price information for a product, it will use a service called calculateProductPrice to determine the actual price of a particular product.

#### **.2.3.9.5.4 Price Component Functions**

Pricing in Open for Business is very flexible and much more robust than simpler systems that function off one or two price inputs. Instead, the price of an item is a function of:

- Price information input on this page
- Pricing rules for this product store
- Promotions currently active for this store.

#### **.2.3.9.5.5 How Price is Calculated**

##### **.2.3.9.5.5.1 Multiple Store Groups?**

If multiple product store groups are defined, the price returned will be for the product store group of the current product store. This makes it possible to create different prices for different stores, such as one targeted to retail consumers and one targeted to wholesale business-to-business (b2b) customers.

##### **.2.3.9.5.5.2 Price Rules**

If there is a list price, then price rules are used for this product. Price rules are based on all the price information available, including default price, list price, promotional price, and average cost. Open for business will run through all the price rules available to look for applicable rules and use them to determine the price of the item. If no price rules are applicable, it will first try to use a default price as the final price. If there is no default price, it will try to use the list price. If neither default nor list price is available and there are no applicable price rules, it will return a price of zero.

##### **.2.3.9.5.5.3 No List Price?**

If there is no list price, then no price rules will be run for the product. The default price will be returned as the price for the product. In addition, competitive price and average cost will be returned as additional available information, in case the calling application uses it.

##### **.2.3.9.5.5.4 Max/ Min Prices**

In all cases, the price will be constrained by the maximum and minimum price.

### **.2.3.9.5.5 Multiple List Prices?**

If there are multiple prices which are applicable at any time, such as two list prices, the first one fetched from the database will be used. This may lead to unintended effects.

### **.2.3.9.5.6 System Performance Cost**

Price rules create a tremendous amount of flexibility in defining prices, but they have a performance cost. On a 2.4 GHz single CPU Pentium machine, using price rules takes approximately 0.05 seconds longer for the same product. Thus, a page which has twenty products will take one second longer.

### **.2.3.9.5.7 Variant Prices**

It is not necessary for a product variant to have prices entered. Open for Business will automatically look up the price of the parent virtual item if the variant product does not have product prices.

## **.2.3.9.6 Content**

### **.2.3.9.6.1 Product Content Tab**

The Product Content tab is for creating and maintaining content information about a product, such as product name, descriptions, and images. The first menu is used to create a new content of a certain type for the product. The second menu is for adding an existing content (using a content ID) to this product. Both of these use the content management system for creating and maintaining content information.

### **.2.3.9.6.2 Override Simple Fields**

Below these two menus is a section called 'override simple fields.' This is where you can still enter content information that is stored directly with the product, rather than maintained by the content manager. If there is product content information in these fields, they will take precedence over what is available from the content manager.

### **.2.3.9.6.3 Upload Image Tool**

Further enhancement is provided with the Upload Image tool which allows you to specify the appearance size of a selected image at viewing.

## **.2.3.9.7 IDs - Product ID Codes**

Product ID codes can be used to associate additional identification numbers to a product, such as UPC codes or ISBN codes. A product can then be found using these identification numbers as well as its Open for Business product ID.

## **.2.3.9.8 Categories**

This tab allows you to add a product to different product categories. The sequence number is used to order the products in the category.

## **.2.3.9.9 Keywords**

This shows what keywords are associated with this product. Keywords are used for search functions in the catalog manager and in order and ecommerce functions. Each keyword has a weight associated with it. You can use it to add or remove keywords.

## **.2.3.9.10 Associations**

This tab shows the products associated with the current one and provides a menu for adding additional product associations. Typical product associations include the following.

### **.2.3.9.10.1 Product variant**

One product is a variant of another, based on features selected. Usually, the variant product (product ID to) is a physical manifestation of a virtual product (product ID from.)

### **.2.3.9.10.2 Complementary, upgrade, or replacement**

Define products which are, respectively, cross-sells, up-sells, or replacements for another product.

### **.2.3.9.10.3 Marketing package component**

One product (product ID to) is used to create a marketing package (product ID from.) An example of a marketing package is a gift basket, composed of different products which may themselves be salable.

### **.2.3.9.10.4 Bill of Materials**

Defines a relationship where one product is used to manufacture another one (more on this in the manufacturing component.)

### **.2.3.9.11 Attributes**

Define and assign product attributes here to help differentiate between your products.

### **.2.3.9.12 Features**

Shows what product features are associated with this product, and the form of their association. A feature can be applied in the following manners: standard, selectable (choose one from many features of this type), distinguishing, optional, required. Each feature has a sequence number and an amount field. You can use this page to add features from feature categories, using their ID codes, or their feature IDs.

### **.2.3.9.13 Facilities**

A facility is analogous to a warehouse and is used to store inventory. This tab specifies the physical warehouse locations where this product will be kept, what the minimum reorder quantities are at this warehouse location, and how many days it takes to ship from this warehouse.

### **.2.3.9.14 Locations**

Defines specific location within a facility. For example, which aisle, what shelf, a bin number, etc., can be reserved specifically for a specific product ID. When various inventory IDs have the same product IDs, this enables quick location of product among the various possible locations.

### **.2.3.9.15 Inventory**

#### **.2.3.9.15.1 Top Portion**

This tab gives a breakdown of actual inventory for the product. The top portion will show a summary of how much inventory in total is available for this product, including both total quantity on hand (QOH), available to promise (ATP), and inventory on incoming shipments. QOH includes inventory which is still in the warehouse but has already been sold and is awaiting shipment. ATP is only inventory which is still available for future orders.

#### **.2.3.9.15.2 Bottom Portion**

The bottom portion of this screen will show actual line items of inventory associated with this product, such as individual orders, shipments, and receipts.

### **.2.3.9.16 Suppliers**

This tab specifies basic information for ordering the product from suppliers. The party ID is a drop-down menu of available suppliers for this product. (For a supplier to show up in this menu, it needs to be created in the party manager and have a role of 'Supplier.')

For each supplier, you can specify the minimum order quantity, order increment, lead time, price (last price), a name, and a product ID.

### **.2.3.9.17 Accounts**

Specifies what General Ledger (GL accounts) should be used for this Sales, Cost of Goods Sold, and Inventory accounts. This allows different GL accounts to be used for different products, breaking out financial accounting as needed.

### **.2.3.9.18 Variants**

#### **.2.3.9.18.1 Virtual Products Only**

If the product is a virtual product, there should also be a 'Variants' tab. This page is laid out in columns, with each

product feature type (ie, size, color) taking up a separate column and each feature value taking up a row. It will show all possible combinations of product features for this virtual product. For each combination, it will show the product variants which exist for this combination of features. If you click on the small box to the far right, it will auto-generate a product ID for this particular variant, using the idCode field of each product feature.

### **.2.3.9.18.2 Multiple Variant Products?**

It usually is a problem if a product has more than one variant product for a particular feature combination. An order-taking or ecommerce applications may not be able to resolve which product it should use when a user selects that particular combination and thus will cause an exception.

## **.2.3.10 Promotions**

### **.2.3.10.1 Similar to Price Rules**

Promotions are similar to Price Rules (see Price Rules, below) but are used to record special promotional offers which apply to the entire order, rather than prices for a particular product. For example, the promotional manager can be used to set up rules to give customers free shipping or a percentage discount if they purchase a minimum quantity, or to create a coupon code.

### **.2.3.10.2 Tied to Specific Stores**

Promotions are tied to specific stores, whereas price rules are applicable to all products (although you can specify the website, product catalog, or category for which a price rule is applicable).

### **.2.3.10.3 Opening Screen**

The opening screen lists all promotions which are currently available and a link for creating additional promotions; click on one to go to a promotion. You will also see a series of four tabs: [Promo], [Rules], [Stores] and [Codes].

### **.2.3.10.4 Promo tab**

At the top is general information about this promotion. Each promotion has an ID, a name and a longer descriptive text, which are shown to customers. If no text is entered, Open for Business will automatically generate text for you.

### **.2.3.10.5 Rules discussion**

Rules for promotions are used to determine what actions should be taken in the promotion. Each promotion can have multiple rules, and each rule can have multiple conditions and actions. If a promotion had multiple rules, they would all be checked in sequence, and the rules whose conditions were true will be activated. This is especially helpful for complicated promotions that have multiple offers.

### **.2.3.10.6 Stores tab**

The stores tab shows a list of product stores in which this promotion is active. You can add additional stores here or delete them.

### **.2.3.10.7 Codes tab**

The codes tab is used to associate codes for a promotion, similar to coupon codes.

## **.2.3.11 Price Rules**

### **.2.3.11.1 Introduction**

The Price Rules tab in the catalog manager allows one to create very complex pricing structures based on basic price data and variables such as the customer, product, or quantity involved. For example, it would be possible to specify quantity discounts, special discounts for a particular group of products, for a particular group of customers, or pricing based on average cost rather than list pricing if certain conditions are met.

### **.2.3.11.2 Using Price Rules**

#### **.2.3.11.2.1 Series of conditions and actions**

Price rules are a series of rules which help determine the prices of products. Each rule is a series of conditions

and actions. When Open for Business needs a price for a product, such as in an order entry or ecommerce application, it will search through all price rules and use the applicable ones to generate the price.

### **.2.3.11.2 Provides flexibility**

The use of price rules allows for far greater flexibility in pricing than would be the case with traditional systems. You can use factors such as products, product catalogs, quantity ordered, and identity of the customer to determine the final price. The actual price can be based on List Price, Default Price, Average Cost, or Promotional Prices, as entered in the Product - Prices screen.

### **.2.3.11.3 Price Rules tab**

#### **.2.3.11.3.1 Maintaining price rules**

The Catalog Manager Price Rules tab provides the screens for maintaining price rules. Click on the 'Price Rules' tab, and you will see a list of rules shown, along with their active dates. There is a link to toggle between viewing all rules or currently active ones. You can click on any rule to view it, or create a new rule.

#### **.2.3.11.3.2 Price Rules Screen**

By clicking on a rule or creating a new rule, you are taken to the price rules screen. The price rules screen has three sections: general rules information, conditions, and actions.

#### **.2.3.11.3.3 IMPORTANT:**

Price rules will only be run if an item has a List Price associated with it.

#### **.2.3.11.3.4 General Rules section**

The general rules information section allows you to enter a name for your rule and the range of dates for which it is valid. It is possible, for example, to enter price rules that will start at a future date (such as a Summer sale), or to 'sideline' old rules in the system but keep them around in case they are needed again. There is also a toggle button next to 'Sale Price'. This will tell Open for Business if the result of the price rule is a sale price, thus allowing the calling application to highlight it as such if necessary.

#### **.2.3.11.3.5 Conditions section**

##### **.2.3.11.3.5.1 Included conditions**

The conditions section specifies a series of conditions for activating the price rule. The conditions include a field, a comparison operator (equals, not equals, greater than, less than), and a value.

##### **.2.3.11.3.5.2 All conditions must be met**

For a price rule to execute, all of the rule's conditions must be met. As the price rule is run, Open for Business will test each field against the value to see if it is true. You can use the rules to specify any of the following.

- Product or products for which the rule is applicable (using fields 'Product,' 'Product Category,' 'Product Catalog.')
- Website for the rules ('Website.')
- Quantity of purchase ('Quantity.')
- Identity of customer ('Party,' 'Party Group Member,' 'Party Classification,' 'Role Type.')

Party refers to a partyId. Party Group member refers to the partyId of a Party Group (such as a corporation) and would be true if a party were part of the party group. Party Classification and Role Type are set in the party manager. See Party Manager documentation for additional details.

- Price point of the product ('List Price.')
- Currency of the store ('CurrencyUomId.')

##### **.2.3.11.3.5.3 Examples**

For example, you can use Product and Quantity conditions to set quantity-based pricing. You can use Party or Party Group Member to specify a discounted price for special customers. You can use Product Category or Product Catalog to limit any of these rules to a specific portion of your product range.

#### **.2.3.11.3.6 Actions Discussion**

Once the conditions are met, the actions are what determine the final price of the product. You can specify any of the following actions:

##### **.2.3.11.3.6.1 Flat Amount Modify**

Modify the price by a flat amount.

### .2.3.11.3.6.2 Flat Amount Override

Regardless of the established price, override it with the Amount given here.

### .2.3.11.3.6.3 Percent of Average Cost

Take the assigned percentage times the established Average Cost. For example, if you wanted to have 100 percent margin over the Average Cost, enter 200 for the value.

### .2.3.11.3.6.4 Percent of Default Price

Generally the same as the List Price, the Default Price is the one assigned in the absence of other calls. In this case, the Price Rule calls for a percentage of the Default Price.

### .2.3.11.3.6.5 Percent of List Price

Assign a percent against the established List Price.

### .2.3.11.3.6.6 Percent of Margin

This refers to List Price - Average Cost. Some companies like to do margin based pricing and not just list or cost based pricing; this makes such possible.

### .2.3.11.3.6.7 Promo Amount Override

Use the 'Promotional Price' for this item as fixed amount, overriding all other price actions; this is not an adjustment of any existing price but rather a replacement of that price.

### .2.3.11.3.6.8 Wholesale Amount Override

Charge only the Wholesale Price, whatever that might be.

### .2.3.11.3.6.9 Multiple actions

When multiple actions are specified, all the actions will be run and the final price determined from that. If there is a Flat Amount or Promotional Amount override, however, these will be used to obtain the final price, and all other actions will be ignored.

## **.2.3.12 Thesaurus**

### **.2.3.12.1 Defining word substitutions**

The thesaurus is a tool for defining word substitutions for the search function. For example, you may want users who search for 'lapptop' to see the same results as those who search for 'laptop.' To do this, click on 'Thesaurus,' put in 'lapptop' in the box to the right of Keyword and 'laptop' in the box next to 'laptop.' Select the relationship of 'correct spelling' and click on 'add.' Now, when someone searches for 'lapptop,' the Open for business search function will automatically substitute 'laptop' for it before conducting the search. You can also add 'computer' as another alternative for 'lapptop,' using the relationship 'broader term.' Now searches for 'lapptop' will return results for both 'laptop' and 'computer.'

### **.2.3.12.2 List of keywords**

Below the menu for defining keyword relationships, you will see a series of letters, each of which will show you keywords which begin with those letters, if you have a large collection of keywords that need to be separated out into multiple pages. Each keyword will show a list of keywords for which it is a substitute and their relationships to the original keyword. Thus, if 'lapptop' is a substitute for both 'computer' and 'laptop,' both words will be listed to the right of 'lapptop' with their respective purposes.

## **.2.3.13 Reviews**

The reviews page is used to approve product reviews before they are shown to customers. Once a customer enters a product review in the ecommerce module, it would show up here, with the name of the customer (even if the customer wishes the review to be anonymous), customer rating, and customer comments. As the administrator, you can modify the customer's rating or comments. You can then select to change the status of the review from 'Pending Approval' to either 'Approved' or 'Denied.' Once approved, the review would become 'live' and viewable by others on the site.



## **.2.3.14 Configurations**

### **.2.3.14.1 Purpose of Configurations**

An offering will frequently involve a central product with a plethora of choices for the customer in optional enhancements, additions, 'soft' options (such as service contracts or extended warranties), or other tie-in offerings to create a larger total sale. <p> The Configurations tab opens a dialog of questions and options which can be created to present these choices to the customer in the e-commerce ordering process or when viewing the offering at the product pages.

### **.2.3.14.2 Developing the Configurations**

From the top menu you define 'questions', link contents to them (images, etc.), and present available options as 'answers' to the 'questions'. Finally you link one or more products to each option.<p> To link one or more questions to one or more products, the product's type must be a 'Configurable Good.' A new tab will magically appear among the product's tabs called 'Configurations'; in it are the configurations ('questions') linked to the product and the tool whereby you add /update /delete them. <p> You can also override some of the standard values of the questions. For example you can customize the question message prompted to the user during order entry.

### **.2.3.14.3 Testing New Configurations**

#### **.2.3.14.3.1 At the ECommerce Site**

##### **.2.3.14.3.1.1 View Product Page**

To test your configuration, go to the related product page at the ecommerce site and see the results of your configuration process. In the bottom of the page a form with the questions or options available will appear.

##### **.2.3.14.3.1.2 Compare Content with Configuration**

The messages, images, or instructions are taken from the content attached to the questions you have created as outlined in the processes described above. Check that the results match your expectations when you created the content configuration questions and dialog

##### **.2.3.14.3.1.3 Check the Prices**

The options prices are derived from the product's prices attached to the selected options and they are used to determine the total configuration price. That final price is shown when the customers click over the 'verify' link. You should confirm that the pricing process deals appropriately with the pricing guidelines.

#### **.2.3.14.3.2 Warehouse and Manufacturing Operations**

##### **.2.3.14.3.2.1 Check the Order Detail Page**

When an order is created for a configured product, a production run is automatically created and linked to the order line. You can see it in the order detail page. The production run will take components from the warehouse for each of the products linked to the selected options.

##### **.2.3.14.3.2.2 Check for Manufacturing Tab**

In creating a production run, the product is linked to a routing; this is done in the manufacturing component and then seen under the new 'manufacturing' tab in the product's pages.

## **.2.4 Content Management**

### **.2.4.1 General**

The term 'content management' generally refers to a system for acquiring, storing and retrieving electronic data in varying formats - such as text, images or proprietary formats. Content management systems (CMS) usually incorporate a rendering system to let the developer display the content in various formats. While some CMSs are rigid in the manner in which content is entered and rendered, the content management module of OFBiz is more of a set of tools which can be used in a variety of situations. In addition to HTML, the content can be rendered in non-Web modes, such as PDF or email newsletters. <p/> The OFBiz CMS is designed to store data once and then allow it to be reused in multiple arrangements. Hence, there are basically two aspects - the back-end storage subsystem, which

is oriented around the DataResource entity, and the front-end association subsystem, which revolves around the Content entity. Note that the Content entity has a foreign key pointing to one and only one DataResource entity, but the same DataResource entity can be referenced by multiple Content entities. It is a general rule that data can only be accessed via a Content entity, but one common exception is that images are typically served up using the DataResource primary key. Content entities are related to other content via ContentAssoc entities. The ContentAssoc entity has a four part primary key and other fields that are used to relate content. The key specifies the 'to' Content and the 'from' Content, as well as the type of association and its effective date. See the discussion of the ContentAssoc entity for more information on how content is related.

### **.2.4.2 Major CMS Entities**

#### **.2.4.2.1 DataResource**

##### **.2.4.2.1.1 General**

The DataResource entity acts as the gateway to actual content retrieval. There are two important fields for determining the format and storage of a resource. These are the 'mimeTypeld' and the 'dataResourceTypeld'. The mime type is the standard Multipurpose Internet Mail Extension, of which, 'text/html' and 'image/gif' will be two of the more common examples. It could be of type ELECTRONIC\_TEXT which indicates that there is an entry in the ElectronicText table that is related to the DataResource by its primary key.

##### **.2.4.2.1.2 mimeTypeld**

The mime type is the standard Multipurpose Internet Mail Extension, of which, 'text/html' and 'image/gif' will be two of the more common examples. The mimeTypeld indicates the format of the content as it is stored. This must be compared to the desired output format to see if the rendering system can handle the request. For example, if the DataResource.mimeTypeld equals, 'image/png', and the target output format is 'text/html', the rendering system could make the logical supposition that it should return an HTML "img.../" tag. If the output format were 'application/pdf' then it will need to determine if it can convert the image to a PDF format.

##### **.2.4.2.1.3 dataResourceTypeld**

The dataResourceTypeld field indicates the storage mechanism for the resource. It could be of type ELECTRONIC\_TEXT, which indicates that there is an entry in the ElectronicText table that is related to the DataResource by its primary key. If the mimeTypeld is of type image, then the dataResourceTypeld could be IMAGE\_OBJECT (stored in the database ImageDataResource table), OFBIZ\_FILE (stored in a file the path of which is relative to the OFBiz home directory) or URL\_RESOURCE (could be accessed via HTTP protocol).

##### **.2.4.2.1.4 dataTemplateTypeld**

One of the powerful concepts of the OFBiz CMS is that it can store templates that can be used to control the formatting of data. In this case, the resource pointed to by the DataResource entity will not be rendered, itself; instead, it will be used as a template to format data that is associated with it. The currently supported templating types are FreeMarker (FTL) and the OFBiz Screen Widget (SCREEN\_COMBINED) format. If the value of dataTemplateTypeld is empty or equal to NONE, then the data pointed to by the dataResource entity is rendered directly.

##### **.2.4.2.1.5 objectInfo**

If dataResourceTypeld is ELECTRONIC\_TEXT or IMAGE\_OBJECT, then objectInfo is not used, but for other types, it will contain the resource storage information. If dataResourceTypeld is one of OFBIZ\_FILE, CONTEXT\_FILE, LOCAL\_FILE or URL\_RESOURCE; then objectInfo contains path info. If dataResourceTypeld equals SHORT\_TEXT, then objectInfo will contain the actual resource (short text) value.

#### **.2.4.2.2 ElectronicText**

ElectronicText contains ASCII text data. An ElectronicText entity can be associated with only one DataResource entity and vice-versa. The mimeTypeld field of the DataResource entity must be checked to determine the format of the ElectronicText data.

#### **.2.4.2.3 ImageDataResource**

ImageDataResource is the equivalent of ElectronicText for binary image data. The DataResource.mimeTypeld must be checked to determine the format of the data.

## **.2.4.2.4 Content**

### **.2.4.2.4.1 General**

The Content entity determines how DataResources are rendered. It does this on a 'local' level, in that it has a mimeTypeId, localeString and other fields that indicate to the rendering system how the DataResource should look, but it can also control the larger picture because it can act as a placeholder and head for other content. The Content.dataResourceId does not need to point to anything, instead a Content entity can be related to other Content via ContentAssoc entities. At some point, some of the child Content entities must point to DataResources, else nothing will ever be displayed.

### **.2.4.2.4.2 dataResourceId**

The dataResourceId points to a DataResource entity that represents content associated with the parent Content entity. The related DataResource could be data that is rendered or it could be a template that indicates how child Content of the parent Content are rendered.

### **.2.4.2.4.3 contentName**

contentName is the field that is used to represent the Content entity in lists. The contentName field value must be less than 100 characters.

### **.2.4.2.4.4 description**

description is used in cases where a short summary or description of the Content is desired. The description field value must be less than 255 characters.

### **.2.4.2.4.5 templateDataResourceId**

The templateDataResourceId field points to a DataResource entity that is used to transform the data contained in the DataResource pointed to by the Content.dataResourceId field. The dataTemplateTypeId of the DataResource pointed to by templateDataResourceId will be checked to determine what sort of transform will be applied.

## **.2.4.2.5 ContentRole**

### **.2.4.2.5.1 General**

The ContentRole entity is used to assign permission authority to a piece of content. The ContentRole entity identifies the Content to which the authority is being attached and the Party that has that authority and what sort of authority (role) that party has. The ContentRole also establishes the time frame (from/thruData) for which that authority is valid.

## **.2.4.2.6 ContentPurpose**

The ContentPurpose entity adds extra information to a Content entity that is used to determine what permissions are required to access that Content.

## **.2.4.2.7 ContentPurposeOperation**

ContentPurposeOperation is used to setup permission validation rules.

## **.2.4.2.8 ContentAssoc**

ContentAssoc relates one Content entity to another. A sense of direction is conveyed in the fact that one field is named contentIdTo (the from field is contentId).

### **.2.4.2.8.1 contentIdTo**

This is the 'parent' Content in a Content-to-Content relationship.

### **.2.4.2.8.2 contentId**

This field is the 'from' or 'child' field in a Content-to-Content relationship.

### **.2.4.2.8.3 contentAssocTypeId**

The contentAssocTypeld field is used to add information about the type of a Content-to-Content relationship. It is part of the primary key. Two Content entities can be related by multiple ContentAssoc entities if the contentAssocTypeld field varies (or the fromDate is different).

### **.2.4.2.8.4 fromDate**

The fromDate field is part of the primary key.

## **.2.4.3 Content Permission Scheme**

### **.2.4.3.1 General**

The OFBiz CMS permission scheme is built around the ContentPurposeOperation table. It should be noted that the more general OFBiz Security permission utilities for CONTENTMGR override the Content permission scheme. If a user has \_CREATE permission with CONTENTMGR, that will override the lack of CMS permissions. The key factor in determining whether or not a user has permission to perform a function is whether or not they possess the correct role and whether it is attached to the right Content entity.

### **.2.4.3.2 ContentPurposeOperation.roleTypeld**

The roleTypeld field of the ContentPurposeOperation contains the RoleType value to be used in determining if a row of the ContentPurposeOperation passes the permission test. The roleTypeld must match the same field in a ContentRole entity that is also attached to the current Content (or an 'owner' - see below for more) and the current party. Or, like other fields, the value of roleTypeld could be \_NA\_, but it is rare that the roleTypeld field would have that value.

### **.2.4.3.3 ContentPurposeOperation.contentOperationId**

The contentOperationId identifies the operation to be performed. Typically, it is a CRUD (CREATE, RETRIEVE, UPDATE or DELETE) variation. It is passed in by the requesting operation; it is not attached to anything like the roleTypeld.

### **.2.4.3.4 ContentPurposeOperation.contentPurposeld**

The contentPurposeld optionally qualifies the condition under which a row in ContentPurposeOperation will pass the permission test. It contains a value from ContentPurposeType and the Content entity under test must have a related ContentPurpose record containing the contentPurposeld. Sometimes permission will be granted to a user if they possess a certain role, but only if the Content is being used for a certain purpose. For example, a clerk may have DELETE authority on Content entities whose purposes are something like GENERAL\_INFO, but not for those which have a purpose of EVIDENCE or no qualifying purpose. The \_NA\_ value can be used for contentPurposeld.

### **.2.4.3.5 statusId and privilegeEnumId**

statusId and privilegeEnumId are two ContentPurposeOperation fields that allow extra fine-tuning of the permission granting process. The statusId field is a foreign key into the StatusType table and privilegeEnumId into the Enumeration table. Usually, these are null or have values of \_NA\_. The statusId field is designed to allow permissions when a document is in one state (eg. DRAFT), but not other (eg. PUBLISHED). The privilegeEnumId allows permissions to be granted based on a user's authority 'level'. Unlike other fields in ContentPurposeOperation, privilegeEnumId matching is not done with an 'equals' test, but rather the privilegeEnumId value is tested to see if it is lower than the user's privilege. If it is, then it passes. This feature is useful in implementing subscription service with varying levels of service.

### **.2.4.3.6 Permission testing process**

The process of permission testing is handled by the org.ofbiz.content.content.ContentPermissionServices.checkContentPermission service, which calls the checkPermission method. The general theme is that the quickest and easiest tests are run first. <p> A test is first made to see if a simple possession of a role is called for and if the user has that role. </p> The permission checker is going through some refactoring and this section of its documentation will be completed when that is done.

## **.2.4.4 Creating, Finding and Managing Data Resources**

### **.2.4.4.1 General**

There are several ways in which DataResource entities can be edited. At the lowest level, the various administration screens of the 'content' module can be used to enter a DataResource entity directly. Once a DataResource entity has been added, the associated text and image screens will bring up or allow the entry of the associated data, depending on the mimeType of DataResource. The content module also has a CMS section that facilitates the creation of content in one step. This process uses the persistContentAndAssoc service. Another way to enter content is to create a custom screen for doing the particular entry of maintenance. Such a screen should rely on the persistContentAndAssoc service.

### **.2.4.4.2 persistContentAndAssoc**

The persistContentAndAssoc service was created in recognition of the fact that content operations often require operations on three or more entities at one time. These operations usually conform to one thing that the user has in mind, so it makes sense to have a high-level service that does all these things. PersistContentAndAssoc has a large parameter set. See the Services appendix for a complete description. It works with parameters for Content, DataResource, ContentAssoc, ElectronicText and ImageDataResource. It also make use of the file upload capabilities in ServiceEventHandler to take care of that function as well. PersistContentAndAssoc works with parameters for these entities or ContentAssoc/DataResource/ViewFrom/To view entities, as well. One key to using persistContentAndAssoc is to properly use the 'type' fields for Content, DataResource and ContentAssoc. If the corresponding type field (ie. contentType, dataResourceType and contentAssocType, respectively) is present, then the persist functions for that entity will take place. PersistContentAndAssoc returns all the primary keys for Content, DataResource and ContentAssoc, if they are available, even if an operation is not performed on that entity.

## **.2.4.5 Adding Organization and Structure with Content**

### **.2.4.5.1 contentType**

There are two main types of Content entities in a CMS. One type is those that contain 'content' and the other is those that act as placeholders and navigation tools. Content oriented contentType values descend from DOCUMENT. The children of DOCUMENT are OUTLINE\_NODE, PAGE\_NODE and SUBPAGE\_NODE. Note that contentType says nothing about content format type, whether it is text or image. Those three sub-values indicate whether the content is to be displayed as an outline only or if content is also to be displayed. Another important assumption made here is that content is organized in a heirarchical fashion. It may seem that OUTLINE\_NODE is more of a navigation type than a content type, but it is used in conjunction with content that all makes up 'one' document. WEB\_SITE\_PUB\_PT is a 'publish point' type. This type would be used to divide a site up into different sections (ie. news, products, forums, etc.)

### **.2.4.5.2 contentAssocType**

The contentAssocType is important for allowing content to be 'followed' correctly. A CMS can be a complicated system with content being associated for many purposes other than 'content'. For example, content that represents topics or keywords may be tied to a piece of content, but it would not be displayed when rendering. One contentAssocType value is SUBSITE. It is used to link Content entities of type, WEB\_SITE\_PUB\_PT, to show that they are a hierarchy of publish points, not subcontent within a document. The value, SUB\_CONTENT, is used for that purpose. The value, PUBLISH\_LINK, is used to link 'document' to 'publish points'.

## **.2.4.6 Creating a Blog**

The process of setting up a blog is primarily one of setting up the correct permissions and then installing and linking the needed screen widget objects together. Blogs usually consist of contributed articles to which viewer responses are attached. These responses can also be responded to, resulting in a hierarchial tree of responses, while the original articles form a list.

### **.2.4.6.1 Blog articles**

A blog system should have facilities for creating and editing articles, displaying a list of article summaries, and display of the full article. The content module CMS administration screens could be used for this purpose, but generally it is better to have custom screens that do things such as allow entry of summary and article from the same page. A blog 'main page' will usually be a list of article summaries with the most recent articles at the top of the list. If all entries are to be displayed the same, then a list form widget could be employed to display this list. If a more complex display scheme were desired, then a tree widget could be used which allows for conditional logic for giving different characteristics to the first article, for instance. Content articles should not be editable

after their Content.statusId is set to PUBLISHED, but this is a site issue. </p>

### **.2.4.6.2 Responses**

Blog responses are, like articles, of DOCUMENT type. They will, however, be connected with contentAssocTypeId values of RESPONSE, not SUB\_CONTENT. <p> Permission schemes could range from allowing any viewer or any logged in viewer to comment to allowing only 'experts' to comment. A 'logged in viewer' permission arrangement could be set up by making an entry in ContentPurposeOperation that allows CREATE (contentOperationId) when the purpose is RESPONSE (contentPurposelId) and roleTypeId is of the special type \_USER\_. </p>

### **.2.4.7 Linking to Content in a Webapp**

Web site organization is usually centered around a 'root' Content entity of ContentType, WEB\_SITE\_PUB\_PT. The id of this Content could be made equal to the value for WebSiteId. As there would generally be subsites within a site, these would also be anchored by a Content entity of WEB\_SITE\_PUB\_PT type and these anchors would be associated with the root Content via SUBSITE type ContentAssoc entities. <p> The various subsite types should have ContentPurpose entries with their own ContentPurposeType, such as NEWS, FORUM, PRODUCT. Keep in mind that ContentPurposes are primarily designed for indicating what sort of permission is required, but they could be used for this purpose, as well. </p>

## .3 Sales Order: Entry, Fulfillment and Returns

### .3.1 Identify the Party

The first step is to establish which Party is placing the order.

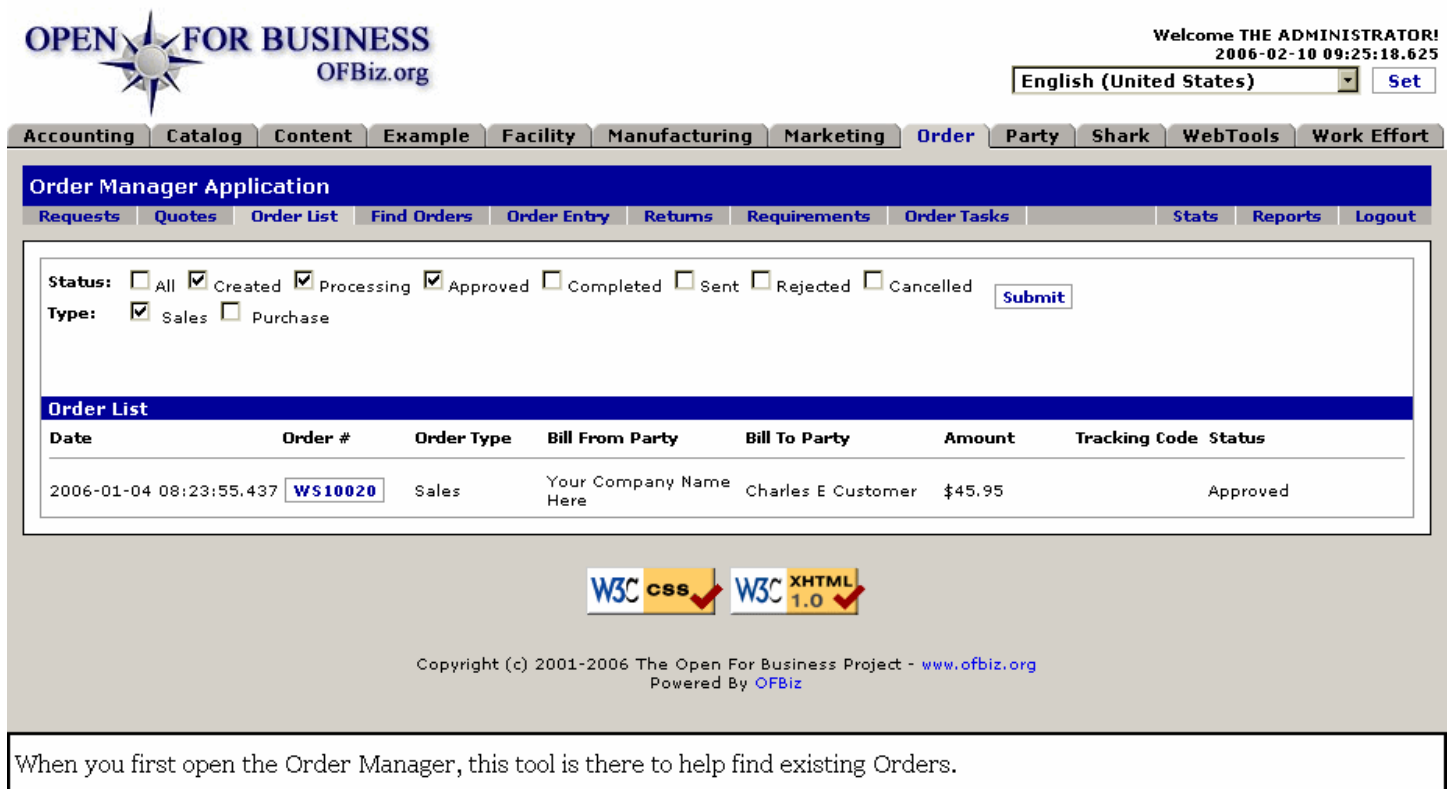
#### .3.1.1 From the Order Manager

##### .3.1.1.1 Working with existing orders

Upon opening the Order Manager, your first screen will be List Orders. Using the check boxes and the [Submit] link, you will bring up a list of all orders in any category selected. <P> To narrow your search, use the FindOrders tab. This brings up a search screen which will take any parameter and use it to find the one you want to work with.

##### .3.1.1.2 OrderList tab

id:[14216] image:



The screenshot displays the Order Manager Application interface. At the top left is the logo for 'OPEN FOR BUSINESS OFBiz.org'. On the top right, it says 'Welcome THE ADMINISTRATOR!' with the date '2006-02-10 09:25:18.625' and a language dropdown set to 'English (United States)' with a 'Set' button. Below this is a navigation bar with tabs: Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order (selected), Party, Shark, WebTools, and Work Effort. The main content area is titled 'Order Manager Application' and has sub-tabs: Requests, Quotes, Order List (selected), Find Orders, Order Entry, Returns, Requirements, Order Tasks, Stats, Reports, and Logout. Below the sub-tabs is a form with 'Status' and 'Type' sections. The 'Status' section has checkboxes for All, Created, Processing, Approved, Completed, Sent, Rejected, and Cancelled. The 'Type' section has checkboxes for Sales and Purchase. A 'Submit' button is to the right. Below the form is an 'Order List' table with the following data:

Date	Order #	Order Type	Bill From Party	Bill To Party	Amount	Tracking Code	Status
2006-01-04 08:23:55.437	<a href="#">WS10020</a>	Sales	Your Company Name Here	Charles E Customer	\$45.95		Approved

At the bottom of the interface, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

When you first open the Order Manager, this tool is there to help find existing Orders.

#### .3.1.1.3 Find Orders tab

##### .3.1.1.3.1 Action on a previous order ...

If your intent is to take further action on an existing order, enter information about the order and click on [Lookup Order]. You will be taken to the appropriate screen in the Order Manager for that order. If specifics about the order are not known, you might prefer to find it through the Party. In that case, select [Lookup Party]. The Party Manager can link you back to previous orders.

##### .3.1.1.3.2 When Find Orders tab is selected ...



## Order Manager Application

### Find Orders

[Hide Fields](#) | [Lookup Order\(s\)](#) | [Lookup Party](#)

Order Id	<input type="text"/>
External ID	<input type="text"/>
Customer PO#	<input type="text"/>
Internal Code	<input type="text"/>
Product ID	<input type="text"/>
Role Type	<input type="text" value="Any Role Type"/>
Party ID	<input type="text"/>
User Login Id	<input type="text"/>
Order Type	<input type="text" value="Any Order Type"/>
Billing Account	<input type="text"/>
Created By	<input type="text"/>
Sales Channel	<input type="text" value="Any Channel"/>
Product Store	<input type="text" value="Any Store"/>
Web Site	<input type="text" value="Any Web Site"/>
Status	<input type="text" value="Any Order Status"/>
Contains BackOrders	<input type="text" value="Show All"/>
Date Filter	<input type="text"/> From <input type="text"/> Thru

Show all records

### Order(s) Found

[Previous](#) | 1 - 7 of 7 | [Next](#)

[Run Action](#)

<input type="checkbox"/> Order Type	Order Id	Name	Survey	Items Ordered	Items Backordered	Items Returned	Remaining SubTotal	Order Total	Status	Order Date	Party ID	
<input type="checkbox"/> Sales	<a href="#">WS10050</a>	Mrs. Sherry Shopper	0	7	0	0	\$112.95	\$117.37	Completed	2006-01-19 08:46:16.609	<a href="#">10011</a>	<a href="#">View</a>
<input type="checkbox"/> Sales	<a href="#">WS10040</a>	Roger Ready	0	4	0	0	\$435.36	\$463.42	Completed	2006-01-10 13:18:07.593	<a href="#">10120</a>	<a href="#">View</a>
<input type="checkbox"/> Purchase	<a href="#">WS10030</a>	Demo Supplier	0	10	0	0	\$216.00	\$216.00	Approved	2006-01-06 18:29:03.0	<a href="#">DemoSupplier</a>	<a href="#">View</a>
<input type="checkbox"/> Sales	<a href="#">WS10020</a>	Charles E Customer	0	2	0	0	\$43.19	\$45.95	Approved	2006-01-04 08:23:55.437	<a href="#">10022</a>	<a href="#">View</a>
<input type="checkbox"/> Purchase	<a href="#">WS10010</a>	Demo Supplier	0	18	0	0	\$7,667.94	\$7,667.94	Approved	2005-12-13 06:04:17.921	<a href="#">DemoSupplier</a>	<a href="#">View</a>
<input type="checkbox"/> Sales	<a href="#">WS10000</a>	Mrs. Sherry Shopper	0	7	0	1	\$239.36	\$248.22	Completed	2005-12-01 08:09:56.595	<a href="#">10011</a>	<a href="#">View</a>



From the Find Orders screen (top portion above), you can specify an order. You can use the [Show all records] link to bring up the results shown here. Or, you can click on [Lookup Party] and proceed as discussed below.



### .3.1.1.3.3 To identify the Party ...

Select an existing Order and complete it or modify it, if that is what the customer is calling for. <br> Or, reduce the number of Orders presented by entering parameters in the search screen, above (you may need to click [Show Lookup Fields] and trying to find what you want more specifically. <br> Or, open a previous order from this customer. There will be a link from that order to the PartyID; click on the ID and you are in the Party Manager > Profile page for the customer. One of the links there is [New Order] which takes you back to the initial Order Entry screen, discussed below.

### .3.1.1.4 Order Entry tab

#### .3.1.1.4.1 When Order Entry tab is selected ...

id:[12151] image:

The screenshot displays the OFBiz Order Manager Application interface. At the top, there is a navigation menu with tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order (selected), Party, Shark, WebTools, and Work Effort. Below the navigation menu is the 'Order Manager Application' header, which includes sub-tabs for Requests, Quotes, Order List, Find Orders, Order Entry (selected), Returns, Requirements, Order Tasks, Stats, Reports, and Logout. The main content area is divided into two sections: 'Sales Order' and 'Purchase Order'. The 'Sales Order' section has a 'Find Party' and 'Continue' button. It contains four input fields: 'Product Store' (dropdown menu with 'OFBiz E-Commerce Store' selected), 'Sales Channel' (dropdown menu with 'No Channel' selected), 'User Login Id' (text input), and 'Party ID' (text input with a search icon). The 'Purchase Order' section also has a 'Find Party' and 'Continue' button. It contains three input fields: 'Internal Organization' (dropdown menu with 'Company - Your Company Name Here' selected), 'Supplier' (dropdown menu with 'No Supplier' selected), and 'User Login Id' (text input). At the bottom of the interface, there are logos for W3C CSS and XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

Order Entry begins with this screen. Using the top portion labeled Sales Order, identify the Party placing the order, either with their User Login ID or Party ID. The search tool can be a help.

#### .3.1.1.4.2 Lookup Party Popup tool

The screenshot shows a web browser window with the address bar displaying 'https://localhost:8443 - Lookup Party by Name - Mozilla'. The page contains a search form with the following fields and options:

- Party ID**: Text input field. Radio buttons:  Equals,  Begins With,  Contains,  Is Empty,  Ignore. Below: **Case**
- PartyTypeId**: Dropdown menu.
- First Name**: Text input field containing 'Sher'. Radio buttons:  Equals,  Begins With,  Contains,  Is Empty,  Ignore. Below: **Case**
- Last Name**: Text input field. Radio buttons:  Equals,  Begins With,  Contains,  Is Empty,  Ignore. Below: **Case**
- Group Name**: Text input field. Radio buttons:  Equals,  Begins With,  Contains,  Is Empty,  Ignore. Below: **Case**

A **Lookup** button is located below the search fields.

Party ID	PartyPartyTypeId	First Name	Last Name	Group Name
10011	Person	Sherry	Shopper	

Use this popup search tool to find the Party ID or Login ID when just the name is known.

### .3.1.1.4.3 Search Tool

Notice the link to the Popup search tool to the right of the Party ID box in the Sales Order section? Click on that and you have the search tool shown above. <p> Here you can either scroll the listing of known Parties or enter the information you might have and let the search find the party for you.

### .3.1.1.5 Discussion

Basically, you cannot place an order until the Party is identified. There are several ways to establish the Party ID from within the Order Manager. Since several of those ways take you back through the Party Manager, it might be just as easy to begin with the Party Manager. See the next topic, <B>From the Party Manager.</B>

## .3.1.2 From the Party Manager

### .3.1.2.1 Locating the Party First

Using the Party Manager, you have several means to reach the PartyID for the person or company which wishes to place an order. <p> 1. Enter the PartyID or LoginID directly if either of those are known. <B>OR</B><p> 2. Enter the known information, such as name, address, etc., in the search fields; the return will appear in the table as shown below. <B>OR</B><p> 3. Search the table of all Parties after clicking on [Show All Records].

### .3.1.2.2 Searching for the Party



Party Manager Application

Find Party [Hide Fields](#) [Lookup Party](#)

Contact Information :  None  Postal  Telecom  CommonOther

Party ID :

User Login :

Last Name :

First Name :

Party Group Name :

Role Type :

Parties Found [Previous](#) | **1 - 6 of 6** | [Next](#)

Party ID	User Login	Name	Type			
10011	(Many)	Shopper, Sherry	Person	<a href="#">Details</a>	<a href="#">Orders</a>	<a href="#">New Order</a>
10022	charley	Customer, Charles	Person	<a href="#">Details</a>	<a href="#">Orders</a>	<a href="#">New Order</a>
10120	R-Ready@mymail.net	Ready, Roger	Person	<a href="#">Details</a>	<a href="#">Orders</a>	<a href="#">New Order</a>
<b>Company</b>	(None)	Your Company Name Here	Party Group	<a href="#">Details</a>	<a href="#">Orders</a>	<a href="#">New Order</a>
<b>DemoCustCompany</b>	DemoCustCompany	Demo Customer Company	Party Group	<a href="#">Details</a>	<a href="#">Orders</a>	<a href="#">New Order</a>
<b>DemoCustomer</b>	DemoCustomer	Customer, Demo	Person	<a href="#">Details</a>	<a href="#">Orders</a>	<a href="#">New Order</a>



Using the Party Manager you can quickly find, identify and establish the Party in the system; click on [New Order].

### .3.1.2.3 Updating Information

Before taking the order, you might want to update the party's information: is the address and phone number current, how will they be paying for the order (credit card number current? EFT information correct?), or perhaps review their ordering history (are there an excessive number of returns?). To look at their file, either click on the [Party ID] or the [Details] link. <P> If the contact from your customer is specifically about a previous order, you can click on the [Orders] link which will take you to a table of all their previous orders.

### .3.1.2.4 Placing a New Order

Once you click on the [New Order] link, you have begun the order taking process through the Order Manager. The internal, 'behind the scenes' processing of the order is very similar to the Ecommerce order.<p> Unlike the Ecommerce ordering process, the customer will not see all of the screens you have available; only the person taking the order can see all the special offers and the details presented. This is why it is important when taking an order over the phone or completing a transcription from a hard copy or email order, that the processor be alert to special offers or to error messages that might appear.

## .3.1.3 From the Ecommerce Application

### .3.1.3.1 Customer enters identity

When a customer first enters the Ecommerce website, they are challenged for a Username and a Password. If they are first time visitors, they are provided an opportunity to create an account. If they have visited before, they are

asked for their username and password. All of their entries are automatically logged into the OFBiz databases for your review in OFBiz and for their ordering processes. They never see any part of OFBiz except the Ecommerce interface which includes the content posted from OFBiz to the Ecommerce portion as called up by their preferences. The Ecommerce ordering path is discussed below.

## .3.1.3.2 Login

id:[12160] image:

**OPEN FOR BUSINESS**  
OFBiz.org

**Open For Commerce**  
Part of the Open For Business Family of Open Source Software  
Welcome Sherry Shopper! (Not You? [Click Here](#))

Shopping Cart is empty  
[\[View Cart\]](#) [\[Quick Checkout\]](#)

[Login](#) [Contact Us](#) [Main](#) [Quick Add](#) [Order History](#) [Shopping Lists](#) [Requests](#) [Quotes](#) [Profile](#)

### Login

**Registered User**

Username:   
(Not shershop? [Click Here](#))

Password:

[Login](#)

**New User**

You may create a new account here:

[Create](#)

**Forgot Your Password?**

Username:

[Get Password Hint](#) [Email Password](#)

Copyright (c) 2001-2006 The Open For Business Project - [www.ofbiz.org](http://www.ofbiz.org)  
Powered By OFBiz

When a customer arrives at your ecommerce site, they are met with these three tools: a login tool labeled "Registered User;" a "New User" tool to create a login; and a means to retrieve their login if they "Forgot Your Password."

## .3.2 Sales Order Entry

### .3.2.1 Ecommerce Entry Path

#### .3.2.1.1 Discussion of two paths

The company's order entry process is discussed below under the Order Manager Path. You may jump there directly if you wish. Both the ecommerce entry and the Order Manager entry methods are discussed in this section to the point where the order entry is finished and Order Approval is needed before proceeding. <P> It is valuable for you to be familiar with the ecommerce order entry process so that when a customer writes or calls in with a problem from that process you can be understanding and helpful. <P> Remember that an order can be canceled anytime up to the final confirmation point! Encourage your staff, especially your customer service people, to walk through an on-line order. They should try to see what happens when clicking on links or following paths that they wouldn't ordinarily follow, just to see what happens! Then, when a customer describes their situation, you can relate to what they are seeing on their screen.

#### .3.2.1.2 First Screen after Login



<a href="#">Logout</a>	<a href="#">Contact Us</a>	<a href="#">Main</a>	<a href="#">Quick Add</a>	<a href="#">Order History</a>	<a href="#">Shopping Lists</a>	<a href="#">Requests</a>	<a href="#">Quotes</a>	<a href="#">Profile</a>
------------------------	----------------------------	----------------------	---------------------------	-------------------------------	--------------------------------	--------------------------	------------------------	-------------------------

**Choose Catalog**

Demo Catalog

---

**Search Catalog**

Any  All

---

**Browse Categories**

- Configurable PCs
- Gift Cards
- Widgets
- Gizmos

---

**Quick Reorder...**

**Micro Chrome Widget**  
WG-1111 \$59.99

**Open Gizmo (LGPL)**  
GZ-1006-1 \$1.99

**Open Gizmo (BSD)**  
GZ-1006-3 \$1.99

**Square Gizmo**  
GZ-2002 \$47.99

**Purple Gizmo**  
GZ-5005 \$47.99

---

**Mouse Hand Poll**

Which hand do you use your mouse with?

Right Hand  \*

---

**Browse Forums**

- Ask the Experts
- Gizmos
- Widgets

---

**Browse Content**

- Gizmos
- Policies
- Widgets

**Featured Products**

Page 1 of 1 1 - 6 of 6

---

**Round Gizmo**  
Round Gizmo w/ Lights - Usually ships in 15 Days!  
GZ-2644 List Price: \$48.00 **On Sale! Your Price: \$38.40**  
Save: \$9.60 (20%)

1

---

**Tiny Chrome Widget**  
Tiny Chrome Widget - Usually ships in 2 Days!  
WG-5569 List Price: \$60.00 **On Sale! Your Price: \$48.00**  
Save: \$12.00 (20%)

1

---

**Giant Widget**  
Giant Widget with Wheels  
Sizes Available: 3-Wheel, 4-Wheel  
WG-9943 Compare At: \$922.00 List Price: \$550.00 **On Sale! Your Price: from \$440.00** Save: \$110.00 (20%)

---

**Gift Card Activation**  
Give the perfect gift!  
GC-001 Your Price: from \$1.00

---

**Gift Card Reload**  
Add more money to your card!  
GC-002

---

**Configurable PC**  
Configurable PC  
PC001 Your Price: \$50.00

Page 1 of 1 1 - 6 of 6

**Language**

English (United ...

---

**Cart Summary**

Shopping Cart is empty

---

**Special Offers**

**Details** Buy 1 Big Gizmo [GZ-8544] or Massive Gizmo [GZ-7000] Get 1 Purple Gizmo [GZ-5005] At 50% off with promo code [9001] (must be associated with Party or Email), no limit

**Details** Spend more than \$1000 in any 12 months on our fabulous Widgets and Gizmos and get a 5% discount.

**Details** Spend more than \$100 on your favorite widgets and gizmos and get a free [Micro Chrome Widget!](#)

---

**Did you know?**

- The use of gizmos has been shown to have no negative effect on personal longevity.
- Gizmos are our most popular item.

---

**Last Categories**

- Featured Products



The first screen after a successful login shouts "BUY - BUY - BUY!!" Each section of this screen is discussed below.

### .3.2.1.3 Customer-centered sections

#### .3.2.1.3.1 Language

If your site is available in more than one language, this user-friendly feature should be very much appreciated.

### **.3.2.1.3.2 Mini-Poll Poll**

You can do surveys with your customers here.

### **.3.2.1.3.3 Did you know?**

Marketing facts, comparisons, plugs, promos, whatever, can be introduced here in a low-key setting.

### **.3.2.1.3.4 Browse Forums**

Links to forums, boards, or other websites are gathered here.

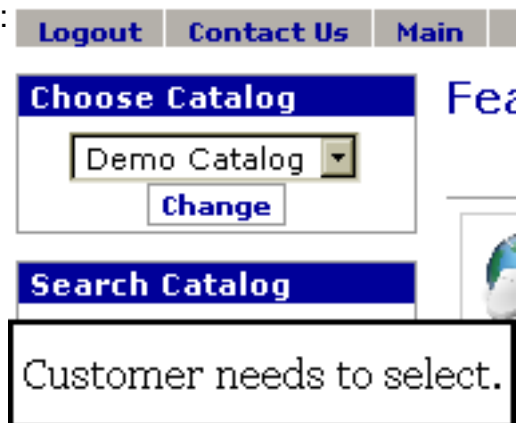
### **.3.2.1.3.5 Special Offers**

Discounts and special promotions are presented here to reward the customer for purchases she has made and to encourage additional purchases. He can click on the link [View All Promotions] to see even more offers than what are presented here.

## **.3.2.1.4 Ordering Process**

### **.3.2.1.4.1 chooseCatalog**

id:[14219] image:



### **.3.2.1.4.2 Choose Catalog**

Your customer might be ordering from your Spring catalog, your Outdoor Specials catalog, or whatever electronic Catalog he may have come across online or through email. Establish or confirm the Catalog here so that details (including prices!) reflect the Catalog he has seen. <p> You might need additional login programming to arrive at the correct catalog if the customer is referred here through internet solicitation and linkage; asking the customer to specify the catalog he saw in the ad is not always productive.<P> The catalog specified here will govern what products, special offers, discounts, and other details of the marketing process are presented in this screen and for the order itself. All of your marketing efforts must be coordinated with the presentation now seen by the customer. Your default catalog needs to be broad enough to cover all the instances where a customer's choices or the login protocol bring him to the default.

### **.3.2.1.4.3 Find Product**

Opportunities to select and order product abound on this screen. The customer can follow whichever path attracts his interest or matches his needs. Those sections of the screen are each discussed below, not necessarily in order of appearance.

#### **.3.2.1.4.3.1 Featured Products**

The center of the screen is a list of all or most of the products under the heading of Featured Products. These can include a photo, description, price, promotional information, discounts, links to the catalog page, link from Virtual products to their variations, place to specify quantity being ordered and the most important link: [Add To Cart]. If more than one page of products is needed, scrolling links are given. <P> This section of the page is replaced by other functions when in use, such as search engines, category lists, etc. The customer can always return to this portion of the screen by clicking on the <B>Main</B> link on the upper Menu bar.

## Application Overview For Users

### .3.2.1.4.3.1.1 Additional information

Clicking on the product name either here or anywhere in the screen will bring up the product detail screen as shown below.

### .3.2.1.4.3.1.2 Click product name for details

[Previous](#)

[Featured Products](#)

[Next](#)

### Tiny Chrome Widget

Tiny Chrome Widget

**WG-5569**

List Price: \$60.00

Regular Price: \$59.99

**On Sale! Your Price: \$48.00**

Save: \$12.00 (20%)

Quantity: 50

Weight: 4

**Usually ships in 2 Days!**

[Tell-A-Friend](#)



[Add to Cart](#)

[New Shopping List](#)

[Add To Shopping List](#)

This tiny chrome widget makes a perfect gift. The shine will last forever. No polishing required.

#### Customer Reviews:

This product hasn't been reviewed yet.

**Be The First To Review This Product!!**

#### You might be interested in these as well:

**GZ-2644** - These two are much more useful together.



#### Round Gizmo

Round Gizmo w/ Lights - Usually ships in 15 Days!

**GZ-2644** List Price: \$48.00 **On Sale! Your Price:**

**\$38.40** Save: \$9.60 (20%)

[Add to Cart](#)

#### Try these instead of Tiny Chrome Widget:

**WG-9943** - A little bit more expensive, but worth every penny!

Every product name is a hotkey to this information which drops into the center of the screen. You can establish what information will appear for each of your featured products.



## .3.2.1.4.3.2 Last Products

id:[14222] image:



Shows the products which the customer has looked at more closely by clicking on the product name; cumulative until [Clear] is pressed.

## .3.2.1.4.3.3 Quick Reorder

## .3.2.1.4.3.3.1 Why offer re-orders?

Previously ordered items are displayed here. Studies have indicated that repeat customers are like gold. By presenting them with reminders of their previous purchases, you are both flattering them and providing an opportunity for another purchase of the same items. <p> This section also saves the customer from having to lookup the items she previously ordered. All are presented here. <P> Doesn't this make the Shopping List concept unnecessary? Not really, because the Shopping Lists can carry 'Wish Lists' as well as previously ordered items. Also, Shopping Lists can be plugged into the order 'en masse' rather than item by item. There could be dozens of different Lists, each tailor-designed for a specific purpose. <P> For regular, heavy-hitter customers, you might want to limit the list of previously-ordered items to only the most recent 10 or so.

## .3.2.1.4.3.3.2 quickReorder

**Quick Reorder...**

**Micro Chrome Widget**  
WG-1111 \$59.99  
[Add 1 to Cart](#)

---

**Open Gizmo (LGPL)**  
GZ-1006-1 \$1.99  
[Add 1 to Cart](#)

---

**Open Gizmo (BSD)**  
GZ-1006-3 \$1.99  
[Add 2 to Cart](#)

---

**Square Gizmo**  
GZ-2002 \$47.99  
[Add 2 to Cart](#)

---

**Purple Gizmo**  
GZ-5005 \$47.99  
[Add 2 to Cart](#)

Items from previous orders are listed here with a link to add them to this order in the same quantity as before.

#### .3.2.1.4.3.4 Browse Categories

Categories are collections of related items. If the customer is looking for Books, for example, this would quickly get him to that portion of the inventory with presentations of Book titles or sub-categories from which to choose. <p> Another way to consider this section: whereas the initial screen might show all the products (with scrolling), the Category selection will eliminate all products displayed except those in the Category he has chosen.

#### .3.2.1.4.3.5 Search in Category

##### .3.2.1.4.3.5.1 How it works

When the [Search In Category] link is selected, a simple but powerful search tool opens in the center screen. By making a few choices and entering a keyword or two, the customer can look for products that exist in the Featured Products category. That tool is shown below. <p> After a successful find, the customer is presented with the second screen shown below, titled productFound. Here she has a couple of choices. If the returns are too extensive, she could refine the search. If she sees what she wants, a quick click on [Add To Cart] will select the product in whatever quantity she enters.

##### .3.2.1.4.3.5.2 searchInCategory

## Advanced Search in Category

Category: **"Featured Products"**. Include sub-categories? Yes  No

Keywords:  Any  All

Sort Order:  Low to High  High to Low

[Find](#)

A click on [Search in Category] brings up this search tool.

.3.2.1.4.3.5.3 productFound

id:[14227] image:

### Product Search, you searched for:

[\[X\]](#) Category: Featured Products (and all sub-categories)

[\[X\]](#) Keyword(s): "Tiny", where any word matches

Sorted by: List Price (Low to High)

[Refine Search](#)

Page 1 of 1 1 - 1 of 1



#### Tiny Chrome Widget

Tiny Chrome Widget - Usually ships in 2 Days!

**WG-5569** List Price: \$60.00 **On Sale! Your Price: \$48.00**

Save: \$12.00 (20%)

[Add to Cart](#)

Page 1 of 1 1 - 1 of 1

Either [Refine Search], [Add to Cart], or return to [Main].

### .3.2.1.4.3.6 Last Categories

As the Customer browses around the screen, looking into various products, categories, or other content, this section is constantly updated with links back to previously-viewed screens. Therefore, he will be able to quickly return to something that has stayed in his memory.

### .3.2.1.4.3.7 Browse Content

Brings up a powerful tool for searching Content which could be documents, case studies, test results, testimonials, additional graphics, specifications, or whatever Content you choose to have accessible to the customer.

### .3.2.1.4.3.8 Search Catalog

#### .3.2.1.4.3.8.1 How it works

Customers will use this to search the catalog by keywords, such as the name of the product or one of its features. You can help their search by keeping the Thesaurus updated.

.3.2.1.4.3.8.2 searchCatalog

id:[14230] image:

The screenshot shows a web application interface for a product search. On the left, there are three sections: 'Choose Catalog' with a dropdown menu set to 'Demo Catalog' and a 'Change' button; 'Search Catalog' with a search input field containing 'Purple', radio buttons for 'Any' and 'All' (with 'All' selected), a 'Find' button, and an 'Advanced Search' button; and 'Browse Categories' with a list of links: '- Configurable PCs', '- Gift Cards', '- Widgets', and '- Gizmos'. The main content area is titled 'Product Search, you searched for:' and displays search criteria: '[X] Category: Demo Default Search (and all sub-categories)', '[X] Keyword(s): "Purple", where all words match', and 'Sorted by: Keyword Relevancy'. Below this is a 'Refine Search' button. On the right, there are two 'Page 1 of 1' indicators. The search results show a product named 'Purple Gizmo' with a small image of a monitor. The description reads 'The stylish gizmo' and 'GZ-5005 List Price: \$48.00 Your Price: \$47.99 Save: \$0.01 (0%)'. There is a quantity input field with '1' and an 'Add to Cart' button.

Entering a term in the Search Catalog section resulted in the results displayed center screen.

**.3.2.1.5 Walk through an order**

Let's assume that our phantom customer, Sherry Shopper, has logged in, selected the Demo Catalog, and is ready to order. We will now follow her through the ordering process.

**.3.2.1.5.1 Sherry selects her products**

Clicking on items displayed or searching through and then selecting from the catalog, Sherry's items are added to her shopping cart. Only the Cart Summary reflects these choices at this time.

**.3.2.1.5.1.1 Selecting from previous orders**

**.3.2.1.5.1.1.1 First, a click on the Order History link**

id:[14234] image:

The screenshot shows a navigation bar with links: 'Logout', 'Contact Us', 'Main', 'Quick Add', 'Order History', and 'Shopping Li'. Below the navigation bar is a table titled 'Order History'. The table has four columns: 'Date', 'Order #', 'Amount', and 'Status'. There are two rows of data, each with a 'View' button to its right.

Date	Order #	Amount	Status
2006-01-19 08:46:16.609	WS10050	\$117.37	Completed
2005-12-01 08:09:56.595	WS10000	\$248.22	Completed

Shopper repeats previous Order Items by calling up [Order History]. Click on [View] to select.

**.3.2.1.5.1.1.2 Then select a previous order**

# Application Overview For Users



Open For Commerce  
Part of the Open For Business Family of Open Source Software  
Welcome Sherry Shopper! (Not You? [Click Here](#) )

Shopping Cart is empty  
[\[View Cart\]](#) [\[Quick Checkout\]](#)

[Logout](#) [Contact Us](#) [Main](#) [Quick Add](#) [Order History](#) [Shopping Lists](#) [Requests](#) [Quotes](#) [Profile](#)

Order #WS10050 Information		Request Return
<b>Name</b>	Mrs. Sherry Shopper	
<b>Status</b>	Completed (Approved/Created)	
<b>Date</b>	2006-01-19 08:46:16.609	

Payment Information	
<b>Credit Card</b>	Sherry Shopper Visa 1111 09/2006
	To: Sherry Shopper 1313 Ave. Z Scottsbluff, NE 69361 USA

Shipping Information	
<b>Destination</b>	To: Mr. Sherwood Shopper [00001] 1525 Ave. J Scottsbluff, NE 69361 USA
<b>Method</b>	UPS Ground
<b>Splitting Preference</b>	Please ship items I ordered as they become available (you may incur additional shipping charges).
<b>Gift?</b>	This order is a gift.
<b>Gift Message</b>	Happy Birthday, Dad!

Language
English (United ...)
<a href="#">Change</a>

Cart Summary
Shopping Cart is empty

### Special Offers

**Details** Spend more than \$1000 in any 12 months on our fabulous Widgets and Gizmos and get a 5% discount.

**Details** Buy \$50 of your favorite gizmos (all products in Gizmo [100] or sub-category) get a free [Open Gizmo!](#) Limit 2 per order.

**Details** \$10 off entire purchase of \$50 or more with promo code [9000], limit use of code to one per customer, limit for three uses total for the code

[View All Promotions](#)

### Did you know?

- The resale value of widgets after five years is 46% higher than that of competitors.
- Widgets outsell gizmos 2:1

### Last Categories [\[Clear\]](#)

- Featured Products

Order Items							<a href="#">Add All to Cart</a>	<a href="#">Add Checked to Cart</a>	<a href="#">Send me this every month</a>
Product	Qty Ordered	Qty Shipped	Qty Cancelled	Unit Price	Adjustments	Subtotal			
<b>GZ-2002 - Square Gizmo</b>	2	2	0	\$47.99	\$0.00	\$96.94	<input type="checkbox"/>		
<b>Adjustment: Sales Tax Jurisdiction:</b> Not Applicable [_NA_] Rate: 1					\$0.96				
<b>Ship Group:</b> [00001] 1525 Ave. J									
<b>GZ-1004 - Rainbow Gizmo</b>	1	1	0	\$25.99	\$0.00	\$26.25	<input type="checkbox"/>		
<b>Adjustment: Sales Tax Jurisdiction:</b> Not Applicable [_NA_] Rate: 1					\$0.26				
<b>Ship Group:</b> [00001] 1525 Ave. J									
<b>GZ-1006-3 - Open Gizmo (BSD)</b>	2	2	0	\$1.99	(\$0.40)	\$3.58	<input type="checkbox"/>		
<b>Adjustment: Promotion</b>					(\$0.40)				
<b>Ship Group:</b> [00001] 1525 Ave. J									
<b>GZ-1006-1 - Open Gizmo (LGPL)</b>	1	1	0	\$1.99	(\$1.99)	\$0.00	<input type="checkbox"/>		
<b>Adjustment: Promotion</b>					(\$1.99)				
<b>Ship Group:</b> [00001] 1525 Ave. J									
<b>WG-1111 - Micro Chrome Widget</b> [Quantity: 50 ] [Weight: 2 ]	1	1	0	\$59.99	(\$59.99)	\$0.00	<input type="checkbox"/>		
<b>Adjustment: Promotion</b>					(\$59.99)				
<b>Ship Group:</b> [00001] 1525 Ave. J									
						<b>Subtotal</b>	\$125.55		
						<b>Promotion</b>	(\$12.60)		
						<b>Shipping and Handling</b>	\$3.20		
						<b>Sales Tax</b>	\$1.22		
						<b>Grand Total</b>	\$117.37		



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Clearly still within the ecommerce website, here the shopper sees details of a previous order. She has options to [\[Add All to Cart\]](#), [\[Add Checked to Cart\]](#) or request an auto-ship with [\[Send me this every month\]](#).

.3.2.1.5.1.1.3 She selects the item(s) wanted

By checking on the item she wants to re-order, then clicking on [Add Checked to Cart], the item (in the same quantity as before) is added to her shopping cart. The screen will not clear out the earlier order, however, until she selects another process for finding her items. This gives her time to consider possibly re-ordering another item from the same list.

.3.2.1.5.1.2 Power shoppers use Quick Add

.3.2.1.5.1.2.1 Quick Add screen

id:[14239] image:

				Add All to Cart
GZ-2644	Round Gizmo	List: \$48.00	\$38.40	<input type="text"/>
GZ-8544	Big Gizmo	List: \$270.00	\$269.99	<input type="text"/>
WG-1111	Micro Chrome Widget	List: \$60.00	\$59.99	<input type="text"/>
WG-5569	Tiny Chrome Widget	List: \$60.00	\$48.00	<input type="text"/>
WG-9943	Giant Widget	List: \$550.00	\$440.00	<input type="text"/> Choose Variation...
				Add All to Cart

Clicking on the Quick Add link brings up this screen.

.3.2.1.5.1.2.2 Choices from Quick Add

Now Sherry can select from the drop-down screen to find a different Quick Add screen, she can add all of the items on this screen, or she can do what she wants -- she elects to click on the link to the Giant Widget, bringing up the next screen.

.3.2.1.5.1.2.3 Choices among the variants



### Giant Widget

Giant Widget with Wheels

**WG-9943**

Sizes Available: 3-Wheel, 4-Wheel

Compare At: \$922.00

List Price: \$550.00

Regular Price: \$549.99

**On Sale! Your Price: from \$440.00**

Save: \$110.00 (20%)

Quantity: 10

Weight: 22

[Tell-A-Friend](#)

Silver

4-Wheel

2

[Add to Cart](#)

Sherry's List

1

[Add To Shopping List](#)



**Black**

**Silver**

This giant widget is mobile. It will seat one person safely. The wheels will never rust or break. Quite a unique item.

#### Customer Reviews:

This product hasn't been reviewed yet.

**Be The First To Review This Product!!**

#### You might be interested in these as well:

**GZ-2644** - This makes it look much better.



#### Round Gizmo

Round Gizmo w/ Lights - Usually ships in 15 Days!

**GZ-2644** List Price: \$48.00 **On Sale! Your Price:**

**\$38.40** Save: \$9.60 (20%)

1

[Add to Cart](#)

Sherry has chosen Silver over Black in the 4-wheel version and can now click [Add To Cart]. Note the [Add To Shopping List] link.

.3.2.1.5.1.3 Final Choices

For her last two items, Sherry chose a His/Her Gizmo (GZ-9290) from the list of Quick Reorder items in the left-hand panel. Note how each time an item is selected, the display of that item is removed from the panel. Finally, on impulse, she added a Round Gizmo from the items listed under 'You might be interested in these as well!' You can see all these purchases now reflected in the Cart Summary.

**.3.2.1.5.2 Cart Summary reflects selections**

id:[12242] image:

#	Item	Subtotal
1	Round Gizmo	\$38.40
1	His/Her Gizmo	\$97.99
2	Giant Widget S4	\$880.00
1	Rainbow Gizmo	\$25.99
1	Open Gizmo (LGPL)	\$0.00
1	Open Gizmo (LGPL)	\$0.00
1	Open Gizmo (LGPL)	\$0.00
1	Micro Chrome Widget	\$0.00
<b>Total:</b>		<b>\$938.14</b>

Four items were selected; four others were added by the system at no cost as promos.

**.3.2.1.5.3 View Cart**



# Application Overview For Users



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Cart has 9 Items, \$938.14  
[\[View Cart\]](#) [\[Quick Checkout\]](#)

Logout | [Contact Us](#) | [Main](#) | [Quick Add](#) | [Order History](#) | [Shopping Lists](#) | [Requests](#) | [Quotes](#) | [Profile](#)

Choose Catalog:  [Change](#)

Quick Add: Product ID:  Quantity:  [Add to Cart](#) [Favorite Shopping](#) | [Refresh](#)

Search Catalog

Any  All [Find](#)

[Advanced Search](#)

- Browse Categories
- Configurable PCs
  - Gift Cards
  - Widgets
  - Gizmos

- Quick Reorder...
- Open Gizmo (BSD)  
GZ-1006-3 \$1.99  
[Add 2 to Cart](#)
- Square Gizmo  
GZ-2002 \$47.99  
[Add 2 to Cart](#)
- Purple Gizmo  
GZ-5005 \$47.99  
[Add 2 to Cart](#)

- Browse Forums
- Ask the Experts
  - Gizmos
  - Widgets

- Browse Content
- Gizmos
  - Policies
  - Widgets

Shopping Cart		<a href="#">Recalculate Cart</a>	<a href="#">Empty Cart</a>	<a href="#">Remove Selected</a>	<a href="#">Checkout</a>
Product	Quantity	Unit Price	Adjustments	Item Total	<input type="checkbox"/>
GZ-2644 - Round Gizmo : Round Gizmo w/ Lights	<input type="text" value="1"/>	\$38.40	\$0.00	\$38.40	<input type="checkbox"/>
GZ-9290 - His/Her Gizmo : A set of his/her gizmos	<input type="text" value="1"/>	\$97.99	\$0.00	\$97.99	<input type="checkbox"/>
WG-9943-S4 - Giant Widget S4 : Silver Giant Widget with 4 Wheels	<input type="text" value="2"/>	\$440.00	\$0.00	\$880.00	<input type="checkbox"/>
GZ-1004 - Rainbow Gizmo : The only multi-colored gizmo	<input type="text" value="1"/>	\$25.99	\$0.00	\$25.99	<input type="checkbox"/>
GZ-1006-1 - Open Gizmo (LGPL) : Gizmo based on open standards <b>You may also choose one of the following for your gift:</b> - Choose Another Gift - <input type="text"/>	<input type="text" value="1"/>	\$1.99	(\$1.99)	\$0.00	<input type="checkbox"/>
GZ-1006-1 - Open Gizmo (LGPL) : Gizmo based on open standards <b>You may also choose one of the following for your gift:</b> - Choose Another Gift - <input type="text"/>	<input type="text" value="1"/>	\$1.99	(\$1.99)	\$0.00	<input type="checkbox"/>
GZ-1006-1 - Open Gizmo (LGPL) : Gizmo based on open standards <b>You may also choose one of the following for your gift:</b> - Choose Another Gift - <input type="text"/>	<input type="text" value="1"/>	\$1.99	(\$1.99)	\$0.00	<input type="checkbox"/>
WG-1111 - Micro Chrome Widget : Micro Widget - Chrome Colored	<input type="text" value="1"/>	\$59.99	(\$59.99)	\$0.00	<input type="checkbox"/>
Sub Total:				\$1,042.38	
Adjustment - Promotion <a href="#">[Details]</a> :				(\$104.24)	
<b>Cart Total:</b>				<b>\$938.14</b>	

P - Promotional items; quantities cannot be modified.

[New Shopping List](#) | [Add Selected To List](#)

[Create a Request For Quote](#) | [Create New Quote From Cart](#)

Always view cart after adding an item.

Promotion/Coupon Codes

[Add Code](#)

- Special Offers
- [Details]** Buy \$50 of your favorite gizmos (all products in Gizmo [100] or sub-category) get a free [Open Gizmo!](#) Limit 2 per order.
- [Details]** Spend more than \$150 on your favorite gizmos (all products in Gizmo [100] or sub-category) and get a free [Open Gizmo!](#)
- [Details]** Buy 1 Big Gizmo [GZ-8544] or Massive Gizmo [GZ-7000] Get 1 Purple Gizmo [GZ-5005] At 50% off with promo code [9001] (must be associated with Party or Email), no limit
- [View All Promotions](#)

- You might also be interested in:
- Nan Gizmo  
Indian style Nan gizmo  
GZ-1001 Your Price: \$25.99  [Add to Cart](#)
  - Big Gizmo  
Big Gizmo w/ Legs - Usually ships in 1 Day!  
GZ-8544 List Price: \$270.00 Your Price: \$269.99 Save: \$0.01 (0%)  [Add to Cart](#)
  - Massive Gizmo  
The biggest gizmo ever  
GZ-7000 List Price: \$999.99 Your Price: \$599.99 Save: \$400.00 (40%)  [Add to Cart](#)

Promotion Information:	Cart Item Use in Promotions:
Promotion <a href="#">[Details]</a> - Total Value \$104.24	Item # 1 [GZ-2644] - 1/1 Used - 0 Available
Promotion <a href="#">[Details]</a> - Total Value \$1.99	- 1 Used as Qualifier of Promotion <a href="#">[Details]</a>
Promotion <a href="#">[Details]</a> - Total Value \$1.99	Item # 2 [GZ-9290] - 1/1 Used - 0 Available
Promotion <a href="#">[Details]</a> - Total Value \$1.99	- 1 Used as Qualifier of Promotion <a href="#">[Details]</a>
Promotion <a href="#">[Details]</a> - Total Value \$59.99	Item # 3 [WG-9943-S4] - 0/2 Used - 2 Available
	- Could be Used as Qualifier of Promotion <a href="#">[Details]</a>
	Item # 4 [GZ-1004] - 1/1 Used - 0 Available
	- 1 Used as Qualifier of Promotion <a href="#">[Details]</a>
	Item # 5 [GZ-1006-1] - Is a Promotional Item
	Item # 6 [GZ-1006-1] - Is a Promotional Item
	Item # 7 [GZ-1006-1] - Is a Promotional Item
	Item # 8 [WG-1111] - Is a Promotional Item



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When [View Cart] is selected, all details of the order-in-progress are displayed to the shopper. She can change quantities, remove selected items, or even add more products as desired.

### **.3.2.1.5.4 Shopping Cart discussion**

First, note how even at this point of viewing the cart, there is an option to quick add another product! From here, the customer can recalculate her cart or continue shopping (which returns her to the previous screen), or proceed with Checkout. <P> Second, there are various promotional messages around this screen to encourage further shopping. <p> Finally, many primary links are available. Notice that the shopper can go into her Profile, she can view established Shopping Lists that she might have created before, she can look at her own Shopping History, etc.

### **.3.2.1.6 Proceed to Checkout**

#### **.3.2.1.6.1 Confirm the shipping address**



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**Cart has 9 Items, \$938.14**  
[\[View Cart\]](#) [\[Quick Checkout\]](#)

[Logout](#) [Contact Us](#) [Main](#) [Quick Add](#) [Order History](#) [Shopping Lists](#) [Requests](#) [Quotes](#) [Profile](#)

### 1) Where shall we ship it?

[Split Shipment](#) [New Address](#)

**To: Sherry Shopper**  
 1313 Ave. Z  
 Scottsbluff  
 NE  
 69361  
 USA [Update](#)

**To: Mr. Sherwood Shopper**  
 1525 Ave. J  
 Scottsbluff  
 NE  
 69361  
 USA [Update](#)

**Tax IDs & Exemptions**  
**Add Tax Info:**  ID:  Is  
 Exempt?

### Language

English (United ...   
[Change](#)

### Cart Summary

[View Cart](#) [Checkout](#)

#	Item	Subtotal
1	Round Gizmo	\$38.40
1	His/Her Gizmo	\$97.99
2	Giant Widget S4	\$880.00
1	Rainbow Gizmo	\$25.99
1	Open Gizmo (LGPL)	\$0.00
1	Open Gizmo (LGPL)	\$0.00
1	Open Gizmo (LGPL)	\$0.00
1	Micro Chrome Widget	\$0.00
<b>Total:</b>		<b>\$938.14</b>

[View Cart](#) [Checkout](#)  
[Quick Checkout](#)

### Special Offers

**Details** Buy \$50 of your favorite gizmos (all products in Gizmo [100] or sub-category) get a free [Open Gizmo!](#) Limit 2 per order.

**Details** 10% off entire purchase

**Details** Spend more than \$1000 in any 12 months on our fabulous Widgets and Gizmos and get a 5% discount.

[View All Promotions](#)

### You Might Like...

**.NIT Gizmo**  
**GZ-1005 \$2,799.99**  
[Add 1 to Cart](#)

**Big Gizmo**  
**GZ-8544 \$269.99**  
[Add 1 to Cart](#)

**Open Gizmo**  
**GZ-1006 From \$1.99**  
[Choose Variation...](#)

### Did you know?

- Gizmos are our most popular item.
- The use of gizmos has been shown to have no negative effect on personal longevity.

### Last Categories [\[Clear\]](#)

- Featured Products

### Last Products [\[Clear\]](#)

**Giant Widget**  
**WG-9943 From \$440.00**  
[Choose Variation...](#)



Step 1: Confirm the shipping address using the radio buttons. If a tax exemption applies, enter details.

### **.3.2.1.6.2 Shipping address and details**



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Welcome Sherry Shopper! (Not You? [Click Here](#))

Cart has 9 Items, \$938.14  
[\[View Cart\]](#) [\[Quick Checkout\]](#)

[Logout](#) [Contact Us](#) [Main](#) [Quick Add](#) [Order History](#) [Shopping Lists](#) [Requests](#) [Quotes](#) [Profile](#)

### 2) How shall we ship it?

UPS Guaranteed Next Day - \$28.55  
 UPS Air - \$15.60  
 UPS Ground - \$8.30  
 USPS Express - \$3.00  
 USPS Standard - \$3.00  
 No Shipping - \$0.00  
 DHL Express - \$20.60  
 DHL Next Afternoon - \$19.60  
 DHL Second Day - \$15.60  
 DHL Ground - \$8.30

---

**Ship all at once, or 'as available'?**

Please wait until the entire order is ready before shipping.  
 Please ship items I ordered as they become available (you may incur additional shipping charges).

---

**Special Instructions**

---

PO Number

---

Is This a Gift?  Yes  No

---

**Gift Message**

---

**Email Addresses**

Your order will be sent to the following email addresses:  
**sherry@yahoo.com**  
 You may update these in your [Profile](#).

You may add other comma separated email addresses here that will be used only for the current order:

**Language**

English (United ...)

[Change](#)

**Cart Summary**

[View Cart](#) [Checkout](#)

#	Item	Subtotal
1	Round Gizmo	\$38.40
1	His/Her Gizmo	\$97.99
2	Giant Widget \$4	\$880.00
1	Rainbow Gizmo	\$25.99
1	Open Gizmo (LGPL)	\$0.00
1	Open Gizmo (LGPL)	\$0.00
1	Open Gizmo (LGPL)	\$0.00
1	Micro Chrome Widget	\$0.00
<b>Total:</b>		<b>\$938.14</b>

[View Cart](#) [Checkout](#)

[Quick Checkout](#)

**Special Offers**

**Details** Get \$500 off any item in the Small Gizmos [101] category, limit 1 per order, 2 per customer, 3 for entire promotion promotion. Discount not to exceed the price of the item.

**Details** Spend more than \$150 on your favorite gizmos (all products in Gizmo [100] or sub-category) and get a free [Open Gizmo!](#)

**Details** Buy 1 Big Gizmo [GZ-8544] or Massive Gizmo [GZ-7000] Get 1 Purple Gizmo [GZ-5005] At 50% off with promo code [9001] (must be associated with Party or Email), no limit

[View All Promotions](#)

**You Might Like...**

**Massive Gizmo**  
GZ-7000 ~~\$599.99~~  
[Add 1 to Cart](#)

**Purple Gizmo**  
GZ-5005 ~~\$47.99~~  
[Add 1 to Cart](#)

**Open Gizmo**  
GZ-1006 From ~~\$1.99~~  
[Choose Variation...](#)

**Did you know?**

- The resale value of widgets after five years is 46% higher than that of competitors.
- The use of gizmos has been shown to have no negative effect on personal longevity.

**Last Categories** [\[Clear\]](#)

- Featured Products

**Last Products** [\[Clear\]](#)

**Giant Widget**  
WG-9943 From ~~\$440.00~~  
[Choose Variation...](#)



Step 2: Confirm the shipping information - method, split, gift, and other details.

**.3.2.1.6.3 Payment particulars**



[Logout](#) [Contact Us](#) [Main](#) [Quick Add](#) [Order History](#) [Shopping Lists](#) [Requests](#) [Quotes](#) [Profile](#)

### 3) How shall you pay?

Add: [Credit Card](#) [EFT Account](#)

Mail Check/Money Order  
 COD  
 Pay With WorldPay  
 Pay With PayPal

CC: Visa 1111 09/2006 [Update](#) Bill Up To:   
 EFT: First City Bank: 100203405 [Update](#)

Gift: \*\*\*\*\*erry [Update](#) Bill Up To:

Pay only with Billing Account  
 Sherry Shopper Personal Account [#10001] (\$1,500.00)  
 Bill Up To:   
 No Billing Account

Use Gift Card Not On File  
 Number   
 PIN   
 Amount

[Single Use Credit Card](#) [Single Use Gift Card](#) [Single Use EFT Account](#)

[Back to Shopping Cart](#)

[Continue to Final Order Review](#)

### Language

English (United ...   
[Change](#)

### Cart Summary

[View Cart](#) [Checkout](#)

#	Item	Subtotal
1	Round Gizmo	\$38.40
1	His/Her Gizmo	\$97.99
2	Giant Widget S4	\$880.00
1	Rainbow Gizmo	\$25.99
1	Open Gizmo (LGPL)	\$0.00
1	Open Gizmo (LGPL)	\$0.00
1	Open Gizmo (LGPL)	\$0.00
1	Micro Chrome Widget	\$0.00
<b>Total:</b>		<b>\$938.14</b>

[View Cart](#) [Checkout](#)  
[Quick Checkout](#)

### Special Offers

**Details** Buy 3 Get 2 Free in the Widgets [200] or any sub-category (except the Small Widgets [201] category and sub-categories, but always including the Micro Widgets [20111] category), limit to two per order

**Details** \$10 off entire purchase of \$50 or more with promo code [9000], limit use of code to one per customer, limit for three uses total for the code

**Details** Buy \$50 of your favorite gizmos (all products in Gizmo [100] or sub-category) get a free [Open Gizmo!](#) Limit 2 per order.

[View All Promotions](#)

- ### You Might Like...
- Massive Gizmo**  
 GZ-7000 ~~\$599.99~~  
[Add 1 to Cart](#)
  - Purple Gizmo**  
 GZ-5005 ~~\$47.99~~  
[Add 1 to Cart](#)
  - Tiny Gizmo**  
 GZ-1000 ~~\$15.99~~  
[Add 1 to Cart](#)

### Did you know?

- Did you know that widget users live twice as long as their non-widget counterparts?
- Widgets outsell gizmos 2:1

### Last Categories [\[Clear\]](#)

- Featured Products

### Last Products [\[Clear\]](#)

Giant Widget  
WG-9943 From ~~\$440.00~~  
[Choose Variation...](#)



Step 3: Payment. Both general methods and those on file for Sherry are shown. Use links to [Single Use Credit Card], [Single Use ...], etc., when the order is being billed to an account not associated with the customer.

**.3.2.1.6.4 Review the Order to Checkout**





- [Logout](#)
- [Contact Us](#)
- [Main](#)
- [Quick Add](#)
- [Order History](#)
- [Shopping Lists](#)
- [Requests](#)
- [Quotes](#)
- [Profile](#)

## Final Checkout Review

NOTE: This is a DEMO store-front. Orders placed here will NOT be billed, and will NOT be fulfilled.

Order Information		Shipping Information	
<b>Status</b>	Not Yet Ordered	<b>Destination</b> [1]	To: Sherry Shopper 1313 Ave. Z Scottsbluff, NE 69361 USA
Payment Information		<b>Method</b>	DHL Express
<b>Payment Via Credit Card</b>		<b>Splitting Preference</b>	Please ship items I ordered as they become available (you may incur additional shipping charges).
<b>Credit Card</b>	Sherry Shopper Visa 1111 09/2006	<b>Gift?</b>	This order is not a gift.
	To: Sherry Shopper 1313 Ave. Z Scottsbluff, NE 69361 USA		

Order Items				
Product	Qty Ordered	Unit Price	Adjustments	Subtotal
GZ-2644 - Round Gizmo [Quantity: 100 ] [Weight: 7 ]	1	\$38.40	\$0.00	\$38.40
GZ-9290 - His/Her Gizmo	1	\$97.99	\$0.00	\$97.99
WG-9943-S4 - Giant Widget S4 [Quantity: 10 ] [Weight: 22 ]	2	\$440.00	\$0.00	\$880.00
GZ-1004 - Rainbow Gizmo	1	\$25.99	\$0.00	\$25.99
GZ-1006-1 - Open Gizmo (LGPL)	1	\$1.99	\$0.00	\$1.99
GZ-1006-1 - Open Gizmo (LGPL)	1	\$1.99	\$0.00	\$1.99
GZ-1006-1 - Open Gizmo (LGPL)	1	\$1.99	\$0.00	\$1.99
WG-1111 - Micro Chrome Widget [Quantity: 50 ] [Weight: 2 ]	1	\$59.99	\$0.00	\$59.99
			<b>Subtotal</b>	\$1,108.34
			<b>Promotion</b>	(\$104.24)
			<b>Promotion</b>	(\$1.99)
			<b>Promotion</b>	(\$1.99)
			<b>Promotion</b>	(\$1.99)
			<b>Promotion</b>	(\$59.99)
			<b>Shipping and Handling</b>	\$20.60
			<b>Sales Tax</b>	\$10.42
			<b>Grand Total</b>	\$969.16

[Back to Options](#)

[Submit Order](#)



Final Review gives the customer the opportunity to review and confirm all details about the order.

**.3.2.1.6.5 Submit the order**

# Application Overview For Users



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Welcome Sherry Shopper! (Not You? [Click Here](#) )

Shopping Cart is empty  
[\[View Cart\]](#) [\[Quick checkout\]](#)

[Logout](#) [Contact Us](#) [Main](#) [Quick Add](#) [Order History](#) [Shopping Lists](#) [Requests](#) [Quotes](#) [Profile](#)

## Order Confirmation

NOTE: This is a DEMO store-front. Orders placed here will NOT be billed, and will NOT be fulfilled.

Order #WS10070 Information		Shipping Information	
<b>Name</b>	Mrs. Sherry Shopper	<b>Destination</b>	To: Sherry Shopper 1313 Ave. Z Scottsbluff, NE 69361 USA
<b>Status</b>	Approved (Created)	<b>Method</b>	DHL Express
<b>Date</b>	2006-02-13 10:06:50.953	<b>Splitting Preference</b>	Please ship items I ordered as they become available (you may incur additional shipping charges).
<b>Credit Card</b>	Sherry Shopper Visa 1111 09/2006	<b>Gift?</b>	This order is not a gift.
	To: Sherry Shopper 1313 Ave. Z Scottsbluff, NE 69361 USA		

Order Items				
Product	Qty Ordered	Unit Price	Adjustments	Subtotal
<b>GZ-2644 - Round Gizmo</b> [Quantity: 100 ] [Weight: 7 ] <i>Adjustment: Sales Tax Jurisdiction: Not Applicable</i> [ _NA_ ] <i>Rate: 1</i> <i>Ship Group: [00001] 1313 Ave. Z</i>	1	\$38.40	\$0.00	\$38.78
<b>GZ-9290 - His/Her Gizmo</b> <i>Adjustment: Sales Tax Jurisdiction: Not Applicable</i> [ _NA_ ] <i>Rate: 1</i> <i>Ship Group: [00001] 1313 Ave. Z</i>	1	\$97.99	\$0.00	\$98.97
<b>WG-9943-S4 - Giant Widget S4</b> [Quantity: 10 ] [Weight: 22 ] <i>Adjustment: Sales Tax Jurisdiction: Not Applicable</i> [ _NA_ ] <i>Rate: 1</i> <i>Ship Group: [00001] 1313 Ave. Z</i>	2	\$440.00	\$0.00	\$888.80
<b>GZ-1004 - Rainbow Gizmo</b> <i>Adjustment: Sales Tax Jurisdiction: Not Applicable</i> [ _NA_ ] <i>Rate: 1</i> <i>Ship Group: [00001] 1313 Ave. Z</i>	1	\$25.99	\$0.00	\$26.25
<b>GZ-1006-1 - Open Gizmo (LGPL)</b> <i>Adjustment: Promotion</i> <i>Ship Group: [00001] 1313 Ave. Z</i>	1	\$1.99	(\$1.99)	\$0.00
<b>GZ-1006-1 - Open Gizmo (LGPL)</b> <i>Adjustment: Promotion</i> <i>Ship Group: [00001] 1313 Ave. Z</i>	1	\$1.99	(\$1.99)	\$0.00
<b>GZ-1006-1 - Open Gizmo (LGPL)</b> <i>Adjustment: Promotion</i> <i>Ship Group: [00001] 1313 Ave. Z</i>	1	\$1.99	(\$1.99)	\$0.00
<b>WG-1111 - Micro Chrome Widget</b> [Quantity: 50 ] [Weight: 2 ] <i>Adjustment: Promotion</i> <i>Ship Group: [00001] 1313 Ave. Z</i>	1	\$59.99	(\$59.99)	\$0.00
			<b>Subtotal</b>	\$1,042.38
			<b>Promotion</b>	(\$104.24)
			<b>Shipping and Handling</b>	\$20.60
			<b>Sales Tax</b>	\$10.42
			<b>Grand Total</b>	\$969.16

[Continue Shopping](#)

[Continue Shopping](#)



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Powered By [OFBiz](#)

When the Submit Order button was selected, behind the scenes wheels were placed in motion, and the order was prepared to be Accepted or Approved. Note the Order #WS10070 near the upper LH corner: that is the customer's link to this order as well as your tracking number for processing through the Picking, Packing and Shipping processes.

### **.3.2.1.7 Some comments on the process**

The process is or should be as intuitive as possible so the customer is not frustrated or confused. Note the many links provided for shopping, searching for products, finding promotions, and so forth. You might want to add a link to a Customer Service bot where on-line help could answer their immediate questions. The final screen even shows a large [Continue Shopping] link, but the [logout] link is rather inconspicuous. <p> Also not discussed yet are the links to [Requests] and [Quotes]. Mechanisms are in place to let the customer go from the ecommerce screen to check on a Request or to view a Quote using links on the top menu bar.

### **.3.2.1.8 Final discussion of the Ecommerce Path**

What we show here is the generic look and feel of an on-line ordering system. The applications are there for you to make this reflect your image while maintaining the underlying tools. You do not need to use all of the marketing or redundant convenience processes shown, but it is good to practice running through this system as a shopper to understand how the customer will interface with your store. Let your customer be treated as you would like to be when you shop online.

## **.3.2.2 Order Manager Path**

### **.3.2.2.1 Discussion**

We will describe the process but not details of each step here. For a detailed description of the many screens and associated fields in the Order Manager, see the <B>Manager Reference: Order</B>.

### **.3.2.2.2 Customer order entry process begins.**

#### **.3.2.2.2.1 First screen with customer specified.**



Welcome THE ADMINISTRATOR!  
2006-02-14 07:48:39.25

English (United States)

<a href="#">Accounting</a>	<a href="#">Catalog</a>	<a href="#">Content</a>	<a href="#">Example</a>	<a href="#">Facility</a>	<a href="#">Manufacturing</a>	<a href="#">Marketing</a>	<a href="#">Order</a>	<a href="#">Party</a>	<a href="#">Shark</a>	<a href="#">WebTools</a>	<a href="#">Work Effort</a>
<b>Order Manager Application</b>											
<a href="#">Requests</a>	<a href="#">Quotes</a>	<a href="#">Order List</a>	<a href="#">Find Orders</a>	<a href="#">Order Entry</a>	<a href="#">Returns</a>	<a href="#">Requirements</a>	<a href="#">Order Tasks</a>		<a href="#">Stats</a>	<a href="#">Reports</a>	<a href="#">Logout</a>
<b>Sales Order</b> <span style="float: right;"><a href="#">Find Party</a>   <a href="#">Continue</a></span>											
Product Store		<input type="text" value="OFBiz E-Commerce Store"/>									
Sales Channel		<input type="text" value="Phone Channel"/>									
User Login Id		<input type="text"/>									
Party ID		<input type="text" value="10011"/>									
<b>Purchase Order</b> <span style="float: right;"><a href="#">Find Party</a>   <a href="#">Continue</a></span>											
Internal Organization		<input type="text" value="Company - Your Company Name Here"/>									
Supplier		<input type="text" value="No Supplier"/>									
User Login Id		<input type="text"/>									
<small>Copyright (c) 2001-2006 The Open For Business Project - <a href="http://www.ofbiz.org">www.ofbiz.org</a> Powered By <a href="#">OFBiz</a></small>											

Order Entry begins with this screen. Using the top portion labeled "Sales Order," identify the Party placing the order, either with their User Login ID or their Party ID. The search tool can help when you only have their name.

### .3.2.2.2 Sales Order vs. Purchase Order

Disregard the Purchase Order section of this screen. That is only used when you (as a representative of your company) are ordering product or services from another vendor for your company's use.

### .3.2.2.3 Product Store

It is probable that your CSR (Customer Service Representative) is processing orders for more than one 'Store' which could be an actual physical presence or a virtual shopping center seen on-line by the customer. Confirming the correct Store at this point is critical.

### .3.2.2.4 Sales Channel

How did this order reach you? Here are some possibilities: <p> 1.) The customer is standing in front of you at your terminal, probably in an actual store front -- POS Channel.<P> 2.) The customer called in the order and you are on the phone with them at this time -- phone channel.<P> 3.) You are reading from a fax sheet, an e-mail printout, a letter or order form -- FAX channel, e-mail channel, or snail mail channel, as appropriate. <P> 4.) Some other party gathered one or more orders together and has forwarded a consolidated order to you -- affiliate channel.<P> 5.) You are not taking the order but it is being processed through the ecommerce website -- defaults the category to web channel.

## .3.2.2.3 Add products to the order.

### .3.2.2.3.1 Primary order entry screen is complex.

# Application Overview For Users



Welcome THE ADMINISTRATOR!  
2006-02-14 08:09:58.546

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools Work Effort

## Order Manager Application

Requests Quotes Order List Find Orders Order Entry Returns Requirements Order Tasks Stats Reports Logout

**Order Header Info**

Party: 10011 Sherry Shopper  
Currency: USD  
Total: \$242.99

**Shortcuts**

- Quotes
- Create New Quote From Cart
- Create a Request For Quote
- Find Party
- Create Customer
- Change Party
- Create New Product
- Quick Add
- Shopping List

**Create Sales Order** [Clear Order](#) [Recalculate Order](#) [Quick Finalize Order](#) [Finalize Order](#)

Product ID: GZ-8544

Quantity: 1

Desired Delivery Date:   Use as default desired delivery date for next entry

Comment:   Use as default comment for next entry

**Add Order Items to Shopping List**

Sherry's List

**Choose Catalog**

Demo Catalog

**Search Catalog**

Any  All

**Browse Categories**

- Configurable PCs
- Gift Cards
- Widgets
- Gizmos

**Order Items**

Product	Quantity	Unit Price	Adjustments	Item Total
GZ-8544 - Big Gizmo <i>Big Gizmo w/ Legs</i> Inventory: ATP = 18, QOH = 18	1	269.99		\$0.00 \$269.99
GZ-1006-1 - Open Gizmo (LGPL) <i>Gizmo based on open standards</i> Features: LGPL Inventory: ATP = 3, QOH = 6 <b>You may also choose one of the following for your gift:</b> Select: Open Gizmo (GPL) Select: Open Gizmo (BSD) Select: Open Gizmo (MIT)	1	\$1.99	(\$1.99)	\$0.00
GZ-1006-1 - Open Gizmo (LGPL) <i>Gizmo based on open standards</i> Features: LGPL Inventory: ATP = 3, QOH = 6 <b>You may also choose one of the following for your gift:</b> Select: Open Gizmo (GPL) Select: Open Gizmo (BSD) Select: Open Gizmo (MIT)	1	\$1.99	(\$1.99)	\$0.00
WG-1111 - Micro Chrome Widget <i>Micro Widget - Chrome Colored</i> Inventory: ATP = 49, QOH = 50	1	\$59.99	(\$59.99)	\$0.00
Sub Total: \$269.99				
Adjustment - Promotion <input type="button" value="Details"/> : (\$27.00)				
				<b>Cart Total: \$242.99</b>

**Promotion/Coupon Codes**

**Manual Promotions**

- Special Offers**
- Details** Spend more than \$100 on your favorite widgets and gizmos and get a free [Micro Chrome Widget!](#)
- Details** 10% off entire purchase
- Details** Spend more than \$150 on your favorite gizmos (all products in Gizmo [100] or sub-category) and get a free [Open Gizmo!](#)
- 

**You might also be interested in:**

**Massive Gizmo**  
The biggest gizmo ever  
GZ-7000 List Price: \$999.99 Your Price: \$599.99 Save: \$400.00 (40%)

1

**Tiny Gizmo**  
The smallest gizmo in town.  
GZ-1000 Your Price: \$15.99

1

**Open Gizmo**  
Gizmo based on open standards - Usually ships in 12 Days!  
GZ-1006 List Price: \$5.99 Your Price: from \$1.99 Save: \$4.00 (66%)

**Promotion Information:**

<b>Promotions Applied:</b>	<b>Cart Item Use in Promotions:</b>
Promotion <b>Details</b> - Total Value \$27.00	Item # 1 [GZ-8544] - 1/1 Used - 0 Available
Promotion <b>Details</b> - Total Value \$1.99	- 1 Used as Qualifier of Promotion <input type="button" value="Details"/>
Promotion <b>Details</b> - Total Value \$1.99	Item # 2 [GZ-1006-1] - Is a Promotional Item
Promotion <b>Details</b> - Total Value \$59.99	Item # 3 [GZ-1006-1] - Is a Promotional Item
	Item # 4 [WG-1111] - Is a Promotional Item



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Powered By OFBiz

The Order screen after one item has been entered; promotional items were added automatically. Each section is discussed below.

### **.3.2.2.3.2 Order Header Info**

Before proceeding with the order entry, confirm that the Party is correctly identified, and that the Currency is in the correct denomination. <p> Click on the Party ID number to go to the Party Manager for confirming or updating information about the Party.<P> A running total of the current order is displayed for quick reference.

### **.3.2.2.3.3 Shortcuts**

#### **.3.2.2.3.3.1 Quotes**

If the customer refers to a quotation submitted to them from your company, go here to locate the Quote.

#### **.3.2.2.3.3.2 Create New Quote From Cart**

Use the items accumulated in the Shopping Cart and, rather than fulfilling an order, prepare a Quotation for the customer. This Quote would go into the system established for Quotes as discussed under the Order Manager.

#### **.3.2.2.3.3.3 Create a Request for Quote**

This more formal process provides a vehicle to identify products of interest to the Customer and assemble a Quotation based upon the Request initiated here. The Request is initially based upon products identified in the Customers Cart, and is created for this named Customer. To follow through on this, see the Requests tab under the Order Manager.

#### **.3.2.2.3.3.4 Find Party**

Takes you to the Party Manager - Find Party screen.

#### **.3.2.2.3.3.5 Create Customer**

If this Order is for a new Customer, here is the link to the Party Manager to establish the information needed in the system.

#### **.3.2.2.3.3.6 Change Party**

Cancels the current Sales Order process and takes you to the initial Order Entry screen where you need to identify the Party.

#### **.3.2.2.3.3.7 Create New Product**

If your customer asks for a product which has not yet been established in the system, and you know you can get it for them, this link allows you to quickly create the product identity within OFBiz before proceeding with the order.

#### **.3.2.2.3.3.8 Quick Add**

Let's say that you are dealing with a customer who knows what he wants and you do not need many of the features and links given on this particular screen. By choosing [Quick Add] you are taken to a simplified ordering screen (shown below) where the order taking can be quickly accomplished. Compare this screen (as shown above) with the Quick Add screen (below) to visualize the differences.

##### **.3.2.2.3.3.8.1 Quick Add Screen**



**Order Manager Application**

Requests Quotes **Order List** Find Orders Order Entry Returns Requirements Order Tasks Stats Reports Logout

**Order Header Info**

Party:  Sherry Shopper  
 Currency: USD  
 Total: \$242.99

**Cart Summary**

#	Item	Subtotal
1	Big Gizmo	\$269.99
1	Open Gizmo (LGPL)	\$0.00
1	Open Gizmo (LGPL)	\$0.00
1	Micro Chrome Widget	\$0.00
<b>Total:</b>		<b>\$242.99</b>

**Browse Categories**

- Configurable PCs
- Gift Cards
- Widgets
- Gizmos

**Create Sales Order**

Main Quick Add

For quick orders, you have found the right place!

Item ID	Item Name	List Price	Price	Quantity	Buttons
GZ-2644	<input type="text" value="Round Gizmo"/>	List:\$48.00	<del>\$48.00</del> \$38.40	<input type="text"/>	<input type="button" value="Add All to Cart"/>
GZ-8544	<input type="text" value="Big Gizmo"/>	List:\$270.00	<del>\$270.00</del> \$269.99	<input type="text"/>	<input type="button" value="Add All to Cart"/>
WG-1111	<input type="text" value="Micro Chrome Widget"/>	List:\$60.00	<del>\$60.00</del> \$59.99	<input type="text"/>	<input type="button" value="Add All to Cart"/>
WG-5569	<input type="text" value="Tiny Chrome Widget"/>	List:\$60.00	<del>\$60.00</del> \$48.00	<input type="text"/>	<input type="button" value="Add All to Cart"/>
WG-9943	<input type="text" value="Giant Widget"/>	List:\$550.00	<del>\$550.00</del> \$440.00	<input type="text"/>	<input type="button" value="Add All to Cart"/> <input type="button" value="Choose Variation..."/>



The Quick Add screen removes many of the links and features of the full Order Entry screen, but may be easier to use.

.3.2.2.3.3.9 Shopping List

.3.2.2.3.3.9.1 Table of existing Shopping lists for this Party

id:[14256] image:

Create Sales Order		Clear Order	Recalculate Order	Quick Finalize Order	Finalize Order
Shopping List	List Type	Description			
Sherry's List	Frequent Purchases		<a href="#">View List</a>	<a href="#">Quick Add All</a>	
New Shopping List	Wish List		<a href="#">View List</a>	<a href="#">Quick Add All</a>	
auto-save	Special Purpose		<a href="#">View List</a>	<a href="#">Quick Add All</a>	
New Shopping List	Wish List		<a href="#">View List</a>	<a href="#">Quick Add All</a>	
New Shopping List	Wish List		<a href="#">View List</a>	<a href="#">Quick Add All</a>	

A click on the Shopping List link brings up a table of this Party's existing Lists. [Quick Add All] brings all of the items on a selected List into this current Order.

.3.2.2.3.3.9.2 Choose single items from a selected Shopping List



Create Sales Order				Clear Order	Recalculate Order	Quick Finalize Order	Finalize Order
Shopping List Id	Shopping List Item Seq Id	Product	Quantity	Reserv Start	Reserv Length	Reserv Persons	Quantity Purchased
10030	00001	GZ-9290 - A set of his/her gizmos	1		0	0	
10030	00002	GZ-5005 - The stylish gizmo	1		0	0	
10030	00003	WG-1111 - Micro Widget - Chrome Colored	1		0	0	

[Quick Add All](#)

[Return](#)

This screen appears if you select and click on a [View List] link. Individual items from this Shopping List can be added to the Order by a click in the RH column.

### .3.2.2.3.4 Choose Catalog

Your customer might be ordering from your Spring catalog, your Outdoor Specials catalog, or whatever Catalog you may have placed into his hands. Establish the Catalog here so that prices reflect the Catalog he sees. This will also govern what products, special offers, discounts, and other details of the marketing process are presented in this screen and for the order itself.

### .3.2.2.3.5 Search Catalog

While talking with the customer, this will give you access to the Catalog to help him locate what he wants.

### .3.2.2.3.6 Browse Categories

Here is another way to find products within categories.

### .3.2.2.3.7 Create Sales Order section

#### .3.2.2.3.7.1 Links to processes


Across the top bar are these link buttons: <P> <B> Clear Order</B> which removes all data from the screen except the Party ID.<P> <B> Recalculate Order</B> which is selected when a quantity or other adjustment has been made. <P> <B> Quick Finalize Order </B>which consolidates several steps into one screen for faster completion. <B> Finalize Order</B> which should not be selected until all entries have been made on this page. This one takes you to the next step in the order process.

#### .3.2.2.3.7.2 Product ID

##### .3.2.2.3.7.2.1 Enter the Product ID

##### .3.2.2.3.7.2.2 Quick Lookup link

id:[14260] image:

Create Sales Order				Clear Order	Recalculate Order	Quick Finalize Order	Finalize Order
Product ID	Brand Name	Internal Name	Quantity - Amount - Desired Delivery Date				
<a href="#">GZ-8544</a>		Big Gizmo	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<a href="#">Add To Order</a>							

Especially useful for preparing Quotes, this pop-in screen gives more control over the order creation process.

.3.2.2.3.7.2.3 Popup Search tool finds products quickly.

id:[12183] image:

	Brand Name	Internal Name	Product Type Id	
<a href="#">GZ-1000</a>		Tiny Gizmo	FINISHED_GOOD	
<a href="#">GZ-1001</a>		Nan Gizmo	FINISHED_GOOD	
<a href="#">GZ-1004</a>		Rainbow Gizmo	FINISHED_GOOD	
<a href="#">GZ-1005</a>		.NIT Gizmo	FINISHED_GOOD	
<a href="#">GZ-1006</a>		Open Gizmo	FINISHED_GOOD	<a href="#">Variants</a>
<a href="#">GZ-1006-1</a>		Open Gizmo (LGPL)	FINISHED_GOOD	
<a href="#">GZ-1006-2</a>		Open Gizmo (GPL)	FINISHED_GOOD	
<a href="#">GZ-1006-3</a>		Open Gizmo (BSD)	FINISHED_GOOD	
<a href="#">GZ-1006-4</a>		Open Gizmo (MIT)	FINISHED_GOOD	
<a href="#">GZ-2002</a>		Square Gizmo	FINISHED_GOOD	
<a href="#">GZ-2644</a>		Round Gizmo	FINISHED_GOOD	
<a href="#">GZ-5005</a>		Purple Gizmo	FINISHED_GOOD	
<a href="#">GZ-7000</a>		Massive Gizmo	FINISHED_GOOD	
<a href="#">GZ-8544</a>		Big Gizmo	FINISHED_GOOD	
<a href="#">GZ-9290</a>		His/Her Gizmo	FINISHED_GOOD	
<a href="#">GZ-BASKET</a>		Auto-Explode Gizmo Basket	FINISHED_GOOD	
<a href="#">GZ-KIT</a>		Pre-Assembled Gizmo Kit	FINISHED_GOOD	

Use the popup search tool to find your products quickly. Select by clicking on Product ID.

.3.2.2.3.7.3 Quantity

How many are wanted?

.3.2.2.3.7.4 Desired delivery date

Note that this does not say <l>Promised delivery dated.</l> If the customer indicates a date when he would like to have the delivery, this date can serve as a guide to when to process the order in house. It also guides you to recommend the appropriate shipping method, ensuring compliance with this date but at the lowest cost to the customer. <P> Use the popup calendar to find the date. <P> <l>Use as default desired delivery date for next entry</l>, if checked, will keep this date for all the items ordered.

.3.2.2.3.7.5 Comment

Be judicious what you write here: this may appear on paperwork reaching the customer such as packing slips, invoices, etc. <P> This may be the place for comments such as 'wrap each item separately' when several units of the same item are being sent in an order to the same address but are intended for different recipients, for example. <P> If the comment applies to more than this item in the order, check the box labeled <l>Use as default comment for next entry</l>

.3.2.2.3.7.6 Add To Order

This button should not be clicked until all details in this section are confirmed: quantity, product, dates, etc. It updates the totals and enters particulars into the next section. It does NOT clear the fields, however, so if it is pressed twice the order will be doubled.

### **.3.2.2.3.8 Add Order Items to Shopping List**

First select a list from the drop-down box, then click on [Add To Shopping List]. All of the ordered items to that point will be added to the selected List, in the quantity ordered.

### **.3.2.2.3.9 Order Items section**

### **.3.2.2.3.10 Promotion/ Coupon Codes**

Enter the code number from other Promotions or Coupons and click on [Add Code]. Appropriate discounts or promotional consideration will be calculated into the order if the Code is currently valid.

### **.3.2.2.3.11 Special Offers**

.3.2.2.3.11.1 Details



**Order Manager Application**

<div style="border: 1px solid black; padding: 5px;"> <p><b>Order Header Info</b></p> <p><b>Party:</b> 10030 Sherry Shopper <b>Currency:</b> USD <b>Total:</b> \$677.38</p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Shortcuts</b></p> <p>[Quotes] [Find Party] [Change Party] [Create New Product] [Quick Add]</p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Choose Catalog</b></p> <p>Demo Catalog <span style="float:right">Change</span></p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Search Catalog</b></p> <p><input type="text"/></p> <p>Any <input checked="" type="radio"/> All <input type="radio"/> <span style="float:right">Find</span> <span style="float:right">Advanced Search</span></p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Browse Categories</b></p> <ul style="list-style-type: none"> <li>- Configurable PCs</li> <li>- Gift Cards</li> <li>- Widgets</li> <li>- Gizmos</li> </ul> </div>	<div style="border: 1px solid black; padding: 5px;"> <p style="text-align: right;"><a href="#">Clear Order</a>   <a href="#">Recalculate Order</a>   <a href="#">Finalize Order</a></p> <p><b>Create Sales Order</b></p> <p><b>Promotion Details:</b> Buy 4 items for \$50 from Purple Gizmo [GZ-5005], Rainbow Gizmo [GZ-1004], Round Gizmo [GZ-2644] or Square Gizmo [GZ-2002] limit 2 per customer Generated Description: Get 4.0 for \$50.0, Limit 2 per customer.</p> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Products For Promotion:</b></p> <p style="text-align: right;">1 - 4 of 4</p> <table border="1" style="width:100%; border-collapse: collapse;"> <thead> <tr> <th style="width:10%;">Qualifier</th> <th style="width:10%;">Benefit</th> <th style="width:10%;"></th> <th style="width:10%;"></th> <th style="width:10%;"></th> <th style="width:10%;"></th> <th style="width:10%;"></th> <th style="width:10%;"></th> <th style="width:10%;"></th> <th style="width:10%;"></th> </tr> </thead> <tbody> <tr> <td>[ ]</td> <td>[x]</td> <td></td> <td><b>Rainbow Gizmo</b> The only multi-colored gizmo <b>GZ-1004</b> Your Price: <b>\$25.99</b></td> <td><input type="text" value="1"/></td> <td></td> <td></td> <td></td> <td></td> <td><a href="#">[Add to Cart]</a></td> </tr> <tr> <td>[ ]</td> <td>[x]</td> <td></td> <td><b>Square Gizmo</b> A square gizmo <b>GZ-2002</b> List Price: \$48.00 Your Price: <b>\$47.99</b> Save: \$0.01 (0%)</td> <td><input type="text" value="1"/></td> <td></td> <td></td> <td></td> <td></td> <td><a href="#">[Add to Cart]</a></td> </tr> <tr> <td>[ ]</td> <td>[x]</td> <td></td> <td><b>Round Gizmo</b> Round Gizmo w/ Lights - Usually ships in 15 Days! <b>GZ-2644</b> List Price: \$48.00 <b>On Sale! Your Price: \$38.40</b> Save: \$9.60 (20%)</td> <td><input type="text" value="1"/></td> <td></td> <td></td> <td></td> <td></td> <td><a href="#">[Add to Cart]</a></td> </tr> <tr> <td>[ ]</td> <td>[x]</td> <td></td> <td><b>Purple Gizmo</b> The stylish gizmo <b>GZ-5005</b> List Price: \$48.00 Your Price: <b>\$47.99</b> Save: \$0.01 (0%)</td> <td><input type="text" value="1"/></td> <td></td> <td></td> <td></td> <td></td> <td><a href="#">[Add to Cart]</a></td> </tr> </tbody> </table> </div>	Qualifier	Benefit									[ ]	[x]		<b>Rainbow Gizmo</b> The only multi-colored gizmo <b>GZ-1004</b> Your Price: <b>\$25.99</b>	<input type="text" value="1"/>					<a href="#">[Add to Cart]</a>	[ ]	[x]		<b>Square Gizmo</b> A square gizmo <b>GZ-2002</b> List Price: \$48.00 Your Price: <b>\$47.99</b> Save: \$0.01 (0%)	<input type="text" value="1"/>					<a href="#">[Add to Cart]</a>	[ ]	[x]		<b>Round Gizmo</b> Round Gizmo w/ Lights - Usually ships in 15 Days! <b>GZ-2644</b> List Price: \$48.00 <b>On Sale! Your Price: \$38.40</b> Save: \$9.60 (20%)	<input type="text" value="1"/>					<a href="#">[Add to Cart]</a>	[ ]	[x]		<b>Purple Gizmo</b> The stylish gizmo <b>GZ-5005</b> List Price: \$48.00 Your Price: <b>\$47.99</b> Save: \$0.01 (0%)	<input type="text" value="1"/>					<a href="#">[Add to Cart]</a>
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Details brings up this working screen where you can present the offer to the customer, offer him his choices and then enter the quantity. Upon clicking [Add to Cart], you are returned to the main Order Entry screen.

.3.2.2.3.11.2 View All Promotions

Create Sales Order	Clear Order	Recalculate Order	Finalize Order
<b>Special Offers</b>			
<b>[Details]</b> Get \$500 off any item in the Small Gizmos [101] category, limit 1 per order, 2 per customer, 3 for entire promotion promotion. Discount not to exceed the price of the item.			
<b>[Details]</b> Buy \$50 of your favorite gizmos (all products in Gizmo [100] or sub-category) get a free <a href="#">Open Gizmo!</a> Limit 2 per order.			
<b>[Details]</b> Spend more than \$150 on your favorite gizmos (all products in Gizmo [100] or sub-category) and get a free <a href="#">Open Gizmo!</a>			
<b>[Details]</b> Spend more than \$1000 in any 12 months on our fabulous Widgets and Gizmos and get a 5% discount.			
<b>[Details]</b> Buy 4 items for \$50 from Purple Gizmo [GZ-5005], Rainbow Gizmo [GZ-1004], Round Gizmo [GZ-2644] or Square Gizmo [GZ-2002] limit 2 per customer			
<b>[Details]</b> Spend more than \$100 on your favorite widgets and gizmos and get a free <a href="#">Micro Chrome Widget!</a>			
<b>[Details]</b> 20% off any one item, either GZ-1005 (.NIT Gizmo) or GZ-1006 (Open Gizmo) with a limit of 1 per order			
<b>[Details]</b> 10% off entire purchase			
<b>[Details]</b> \$10 off entire purchase of \$50 or more with promo code [9000], limit use of code to one per customer, limit for three uses total for the code			
<b>[Details]</b> Buy 3 Get 2 Free in the Widgets [200] or any sub-category (except the Small Widgets [201] category and sub-categories, but always including the Micro Widgets [20111] category), limit to two per order			
<b>[Details]</b> Buy 1 Big Gizmo [GZ-8544] or Massive Gizmo [GZ-7000] Get 1 Purple Gizmo [GZ-5005] At 50% off with promo code [9001] (must be associated with Party or Email), no limit			

View All Promotions brings up this overlay on the Create Sales Order section where you can select from any of the current promotions. Click on [Details] to bring up the screen previously discussed. Click the [Order Entry] tab to return to the current order.

### **.3.2.2.3.12 You might also be interested in**

Strictly a promotional tool, here is a selection of items which you can offer to the customer before moving past this screen. Simply enter the quantity and [Add to Cart] when he indicates acceptance.

### **.3.2.2.3.13 Promotion Information**

In the left-hand portion of this section, all those Promotions which have been applied to the order are given. Select [Details] to obtain more information.<P> In the right-hand portion, the ordered items which made the customer eligible for a promotion are given. Promotion opportunities not yet applied are also indicated. Every item being shipped as a promotional giveaway is listed as well.

## **.3.2.2.4 Finalize Order**

### **.3.2.2.4.1 Shipping**

#### **.3.2.2.4.1.1 Ship To address**

id:[12201] image:



Welcome THE ADMINISTRATOR!  
2005-07-08 20:09:19.325

English (United States)

[Accounting](#) [Catalog](#) [Content](#) [Facility](#) [Manufacturing](#) [Marketing](#) [Order](#) [Party](#) [Shark](#) [WebTools](#) [WorkEffort](#)

### Order Manager Application

[Requests](#) [Quotes](#) [Find Orders](#) [Order Entry](#) [Returns](#) [Requirements](#) [Order Tasks](#) [Stats](#) [Reports](#) [Logout](#)

[Sales Order : Order Entry Ship-To Settings](#) [Order Items](#) [Shipping](#) [Options](#) [Payment](#) [Parties](#) [Review Order](#) [Continue](#)

[\[Create New\]](#)

**To:** Sherry Shopper  
123 Center Street  
Pleasant Grove  
UT  
84055  
USA

[\[Update\]](#)



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Powered By [OFBiz](#)

Click the radio button beside the address to which the order will be shipped, then click on [Continue]. If the ship-to is different, click on [Create New], complete the address, then press [Continue].

### .3.2.2.4.2 Options

#### .3.2.2.4.2.1 Additional details about the order

**Order Manager Application**
**Sales Order : Order Option Settings**

- UPS Guaranteed Next Day - \$22.60  
 UPS Air - \$12.20  
 UPS Ground - \$6.60  
 USPS Express  
 USPS Standard  
 No Shipping - \$0.00

**Ship all at once, or 'as available'?**

- Please wait until the entire order is ready before shipping.  
 Please ship items I ordered as they become available (you may incur additional shipping charges).

**Special Instructions**


 PO Number 

 Is This a Gift?  Yes  No

**Gift Message**
  


 Ship Before Date : 

 Ship After Date : 


Complete all applicable Options before clicking on [Continue].

### .3.2.2.4.2.2 Shipping methods

Select the radio button for the preferred shipping method. Consider the customer's desired delivery date, the availability of product, your order processing time, and the transportation time required before agreeing with the customer to a specific mode of shipping. <P> Note how the cost of each method is already determined and displayed for you. Let the customer know the cost involved and obtain his consent to the cost.

### .3.2.2.4.2.3 Single or multiple shipments

Sometimes the customer needs to have all parts of the order available at the same time; they will elect to wait until all of the items are available before shipping. Others want whatever items are available immediately and prefer not to wait for the rest. Select the radio button to match their preference, but explain that an additional shipping cost might be incurred.

### .3.2.2.4.2.4 Special Instructions

If you get them, record any special instructions here. These will appear on the Pick Sheets.

### .3.2.2.4.2.5 PO Number

If this order is being completed from a numbered Purchase Order, enter that number here. Otherwise, disregard.

### .3.2.2.4.2.6 Gift? / Gift Message

The Yes radio button selection will direct packers to Gift Wrap if that was requested in the order. Also, it directs them to attach the Message which follows in the next section.

### .3.2.2.4.2.7 Ship Before / After Date

The customer could have any one of many different reasons for wanting the order to be shipped before or after a specific date. For example, budget that must be spent within a certain quarter would require the order be fulfilled before the end of the quarter. Similarly, if the item is not budgeted until next quarter, but they want to receive it early within that quarter, they might specify the first day of the next business quarter. <P> Use the popup calendar to identify and insert the date, else enter with the format: yyyy-MM-dd 00:00:00

## .3.2.2.4.3 Payment

### .3.2.2.4.3.1 How will they pay?

id:[12209] image:

The screenshot displays the OFBiz application interface. At the top left is the logo for 'OPEN FOR BUSINESS OFBiz.org'. At the top right, it says 'Welcome THE ADMINISTRATOR!' with the date and time '2005-07-08 20:34:22.716'. Below this is a language dropdown menu set to 'English (United States)' and a 'Set' button. A navigation bar contains tabs for Accounting, Catalog, Content, Facility, Manufacturing, Marketing, Order (selected), Party, Shark, WebTools, and WorkEffort. Below the navigation bar is the 'Order Manager Application' header with sub-tabs: Requests, Quotes, Find Orders, Order Entry (selected), Returns, Requirements, Order Tasks, Stats, Reports, and Logout. The main content area shows the 'Sales Order : Order Entry Payment Settings' screen. It has a sub-header with tabs: Order Items, Shipping, Options, Payment (selected), Parties, Review Order, and Continue. The payment settings are listed as follows:

- Offline Payment: Check/Money Order
- Payment already received
- Credit Card: Visa/Mastercard/Amex/Discover
- EFT Account: AHC/Electronic Check

At the bottom of the application area, there are logos for W3C CSS and W3C XHTML 1.0, both with checkmarks. Below these is the copyright notice: 'Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. A text box at the bottom of the screenshot contains the instruction: 'Select the radio button to correspond with the payment method preferred by the customer.'

### .3.2.2.4.3.2 Offline / Payment Received





Welcome THE ADMINISTRATOR!  
2005-07-08 20:41:18.606

English (United States)

**Accounting** | **Catalog** | **Content** | **Facility** | **Manufacturing** | **Marketing** | **Order** | **Party** | **Shark** | **WebTools** | **WorkEffort**

**Order Manager Application**

**Requests** | **Quotes** | **Find Orders** | **Order Entry** | **Returns** | **Requirements** | **Order Tasks** | **Stats** | **Reports** | **Logout**

**Sales Order : Order Entry Payment Settings** | **Order Items** | **Shipping** | **Options** | **Payment** | **Parties** | **Review Order** | **Continue**

Billing address is the same as the shipping address

To Name

Attention Name

Address Line 1  \*

Address Line 2

City  \*

State/Province

Zip/Postal Code  \*

Country  \*



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Billing information is completed here when credit card or eft payments are not used.

.3.2.2.4.3.3 Credit/Debit card



**Order Manager Application**

**Sales Order : Order Entry Payment Settings** | Order Items | Shipping | Options | **Payment** | Parties | Review Order | Continue

Billing address is the same as the shipping address

To Name

Attention Name

Address Line 1  \*

Address Line 2

City  \*

State/Province

Zip/Postal Code  \*

Country  \*

Company Name on Card

Prefix on Card

First Name on Card  \*

Middle Name on Card

Last Name on Card  \*

Suffix on Card

Card Type  \*

Card Number  \*

Expiration Date   \*



Credit (or debit) card information can be obtained at this point and will be posted to the Order Manager DB.

.3.2.2.4.3.4 Electronic Fund Transfer



**Order Manager Application**

**Sales Order : Order Entry Payment Settings** | Order Items | Shipping | Options | **Payment** | Parties | Review Order | Continue

Billing address is the same as the shipping address

To Name	<input type="text" value="Sherry Shopper"/>
Attention Name	<input type="text"/>
Address Line 1	<input type="text"/> *
Address Line 2	<input type="text"/>
City	<input type="text"/> *
State/Province	<input type="text"/>
Zip/Postal Code	<input type="text"/> *
Country	<input type="text" value="United States"/> *
<hr/>	
Name on Account	<input type="text"/> *
Company Name on Account	<input type="text"/>
Bank Name	<input type="text"/> *
Routing Number	<input type="text"/> *
Account Type	<input type="text"/> *
Account Number	<input type="text"/> *



To one-time debit the customer's bank account, complete the form here.

**.3.2.2.4.4 Parties**

There may be reasons for associating another Party or Group with the order. For example, the person placing the order might be a member of an existing customer group, such as a shopping club, or they might be a purchasing agent for a company and need to be identified with that company. <p> When you select to identify another group or individual for association, a process will be followed. You will be returned automatically to complete the rest of the order.

**.3.2.2.4.5 Review Order**



Welcome THE ADMINISTRATOR!  
2005-07-08 20:56:03.091

English (United States)

Accounting | Catalog | Content | Facility | Manufacturing | Marketing | **Order** | Party | Shark | WebTools | WorkEffort

## Order Manager Application

Requests | Quotes | Find Orders | **Order Entry** | Returns | Requirements | Order Tasks | Stats | Reports | Logout

### Sales Order : Order Confirmation Order Items | Shipping | Options | Payment | Parties | Review Order | Create Order

<b>Destination</b>	To: Sherry Shopper 123 Center Street Pleasant Grove, UT 84055 USA
<b>Method</b>	UPS Ground
<b>Splitting Preference</b>	Please wait until the entire order is ready before shipping.
<b>Gift??</b>	This order is a gift
<b>Gift Message</b>	Happy birthday, my husband. Love, Sherry Shopper
<b>Ship Before Date</b>	2005-07-14 00:00:00.000

### Payment Information Offline Payment

### Order Items

Product	Quantity	Unit Price	Adjustments	Sub.Total
<b>WG-9943-S3 - Giant Widget S3</b>	1	\$440.00	\$0.00	\$465.30
<i>Adjustment: Sales Tax Jurisdiction: Utah [UT] (in: United States [USA]) Rate: 0.048</i>				\$20.90
<i>Adjustment: Sales Tax Jurisdiction: Not Applicable [_NA_] Rate: 0.01</i>				\$4.40
<b>GZ-8544 - Big Gizmo</b>	1	\$269.99	\$0.00	\$285.51
<i>Adjustment: Sales Tax Jurisdiction: Utah [UT] (in: United States [USA]) Rate: 0.048</i>				\$12.82
<i>Adjustment: Sales Tax Jurisdiction: Not Applicable [_NA_] Rate: 0.01</i>				\$2.70
<b>GZ-1006-1 - Open Gizmo (LGPL)</b>	1	\$1.99	(\$1.99)	\$0.00
<i>Adjustment: Promotion</i>				(\$1.99)
<i>Adjustment: Sales Tax Jurisdiction: Utah [UT] (in: United States [USA]) Rate: 0.048</i>				\$0.00
<b>GZ-1006-1 - Open Gizmo (LGPL)</b>	1	\$1.99	(\$1.99)	\$0.00
<i>Adjustment: Promotion</i>				(\$1.99)
<i>Adjustment: Sales Tax Jurisdiction: Utah [UT] (in: United States [USA]) Rate: 0.048</i>				\$0.00
<b>WG-1111 - Micro Chrome Widget</b>	1	\$59.99	(\$59.99)	\$0.00
<i>Adjustment: Promotion</i>				(\$59.99)
<i>Adjustment: Sales Tax Jurisdiction: Utah [UT] (in: United States [USA]) Rate: 0.048</i>				\$0.00
<i>Adjustment: Sales Tax Jurisdiction: Not Applicable [_NA_] Rate: 0.01</i>				\$0.00
<b>Sub.Total</b>				\$709.99
<b>Promotion</b>				(\$71.00)
<b>Shipping and Handling</b>				\$6.60
<b>Sales Tax</b>				\$40.82
<b>Grand Total</b>				\$686.41



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If there are any discrepancies in the order, this is the time to fix them. Click on the appropriate link to the right of Sales Order : Order Confirmation to be returned to the applicable screen. When everything meets with the customer's approval, then click on [Create Order].

### **.3.2.2.5 Create Order**

#### **.3.2.2.5.1 Order confirmation screen**

# Application Overview For Users



Welcome THE ADMINISTRATOR!  
2005-07-08 21:03:14.841

English (United States)

Accounting Catalog Content Facility Manufacturing Marketing **Order** Party Shark WebTools WorkEffort

## Order Manager Application

Requests Quotes Find Orders Order Entry Returns Requirements Order Tasks Stats Reports Logout

### Order Confirmation #WS10010

<b>Destination</b>	To: Sherry Shopper 123 Center Street Pleasant Grove, UT 84055 USA
<b>Method</b>	UPS Ground
<b>Splitting Preference</b>	Please wait until the entire order is ready before shipping.
<b>Gift??</b>	This order is a gift
<b>Gift Message</b>	Happy birthday, my husband. Love, Sherry Shopper
<b>Ship Before Date</b>	2005-07-14 00:00:00.000

### Payment Information

<b>Offline Payment</b>	
<b>Please Send Payment To::</b> Company XYZ 2003 Open Blvd Open City, CA 999999 USA	
<b>Be sure to include your order #</b>	

### Order Items

Product	Quantity	Unit Price	Adjustments	Sub.Total
<b>WG-9943-S3 - Giant Widget S3</b>	1	\$440.00	\$0.00	\$465.30
<i>Adjustment: Sales Tax Jurisdiction: Utah [UT] (in: United States [USA]) Rate: 0.048</i>				\$20.90
<i>Adjustment: Sales Tax Jurisdiction: Not Applicable [_NA_] Rate: 0.01</i>				\$4.40
<b>GZ-8544 - Big Gizmo</b>	1	\$269.99	\$0.00	\$285.51
<i>Adjustment: Sales Tax Jurisdiction: Utah [UT] (in: United States [USA]) Rate: 0.048</i>				\$12.82
<i>Adjustment: Sales Tax Jurisdiction: Not Applicable [_NA_] Rate: 0.01</i>				\$2.70
<b>GZ-1006-1 - Open Gizmo (LGPL)</b>	1	\$1.99	(\$1.99)	\$0.00
<i>Adjustment: Promotion</i>				(\$1.99)
<i>Adjustment: Sales Tax Jurisdiction: Utah [UT] (in: United States [USA]) Rate: 0.048</i>				\$0.00
<b>GZ-1006-1 - Open Gizmo (LGPL)</b>	1	\$1.99	(\$1.99)	\$0.00
<i>Adjustment: Promotion</i>				(\$1.99)
<i>Adjustment: Sales Tax Jurisdiction: Utah [UT] (in: United States [USA]) Rate: 0.048</i>				\$0.00
<b>WG-1111 - Micro Chrome Widget</b>	1	\$59.99	(\$59.99)	\$0.00
<i>Adjustment: Promotion</i>				(\$59.99)
<i>Adjustment: Sales Tax Jurisdiction: Utah [UT] (in: United States [USA]) Rate: 0.048</i>				\$0.00
<i>Adjustment: Sales Tax Jurisdiction: Not Applicable [_NA_] Rate: 0.01</i>				\$0.00
<b>Sub.Total</b>				\$709.99
<b>Promotion</b>				(\$71.00)
<b>Shipping and Handling</b>				\$6.60
<b>Sales Tax</b>				\$40.82
<b>Grand Total</b>				\$686.41



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Be sure to give the customer his Order Confirmation number. The appearance of this form indicates that all internal processes for processing the order have been completed up to but not including order approval.

**.3.2.2.5.2 Order Entry is now completed.**

Congratulations! You have completed all the aspects of entering an order into the system. Be sure the customer receives the Order Confirmation number. You might wish to mail or fax a copy of this screen to the customer for their reference. Work has just begun behind the scenes for processing the order, however. The next step will be giving Acceptance and/or Approval for the order which will trigger the processes needed to get the product out the door.

**.3.3 Order Acceptance/Approval**

**.3.3.1 When the order comes in ...**

**.3.3.1.1 OrderList**

id:[14262] image:

The screenshot shows the 'Order Manager Application' interface. At the top, there is a logo for 'OPEN FOR BUSINESS OFBiz.org' and a user greeting: 'Welcome THE ADMINISTRATOR! 2006-02-15 06:24:10.968'. A language dropdown menu is set to 'English (United States)'. A navigation bar contains tabs for Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order (selected), Party, Shark, WebTools, and Work Effort. Below this is a sub-menu for 'Order Manager Application' with tabs for Requests, Quotes, Order List (selected), Find Orders, Order Entry, Returns, Requirements, Order Tasks, Stats, Reports, and Logout. The main content area has a 'Status' filter section with checkboxes for All, Created, Processing, Approved, Completed, Sent, Rejected, and Cancelled. The 'Type' filter has checkboxes for Sales and Purchase. A 'Submit' button is present. Below the filters is an 'Order List' table with the following data:

Date	Order #	Order Type	Bill From Party	Bill To Party	Amount	Tracking Code	Status
2006-02-13 10:06:50.953	<a href="#">WS10070</a>	Sales	Your Company Name Here	Mrs. Sherry Shopper	\$969.16		Approved
2006-01-04 08:23:55.437	<a href="#">WS10020</a>	Sales	Your Company Name Here	Charles E Customer	\$45.95		Approved

At the bottom of the application, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.

The Order List is the first screen presented under the Order Manager. Select a Status and all orders in that Status are listed.

**.3.3.1.2 Finding the order**

A. - Open the order manager. Your first screen automatically lists all the current orders in need of processing. You should spot the one prepared above in the list; click on the Order Number to proceed. If too many orders are listed in the first screen (List Orders), unclick the 'Approved' checkbox and click on [Submit]. If still too many, unclick either the 'Created' or the 'Processing' status checkbox and try again. B. - To find a specific Order, you may also use the Find Orders tab. Either enter the order number (Ex. WS10070), or another parameter or two as shown in the screen below. This should return screens with the Order you seek included.

**.3.3.1.3 Orders Created**



Welcome THE ADMINISTRATOR!  
2006-02-16 08:55:36.046

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing **Order** Party Shark WebTools Work Effort

**Order Manager Application**

Requests Quotes **Order List** Find Orders Order Entry Returns Requirements Order Tasks Stats Reports Logout

Status:  All  Created  Processing  Approved  Completed  Sent  Rejected  Cancelled   
 Type:  Sales  Purchase

**Order List**

Date	Order #	Order Type	Bill From Party	Bill To Party	Amount	Tracking Code	Status
2006-02-16 08:29:56.265	<a href="#">WS10082</a>	Sales	Wonderful Widgets & Gizmos	Charles E Customer	\$337.86		Created



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Powered By OFBiz

Order currently awaiting approval after being created by or for the Customer. Click [View] or the OrderID.

### .3.3.1.4 View Order

If you have an approval process, you will want to check over the details to confirm that the shipping information is complete and accurate, that the billing details are acceptable and that the requested shipping dates (if specified) are within your company's capabilities. <P> Note the link to [PDF]. This will create a PDF formatted document which can be used internally for paper processing the order or sent to the customer as an attachment or hard copy to confirm the order. The customer should be told that the Order Number should be referenced in any correspondence regarding the order.

#### .3.3.1.4.1 Ready for Approval



# Application Overview For Users



Welcome THE ADMINISTRATOR  
2006-02-16 08:08:29.203

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing **Order** Party Shark WebTools Work Effort

## Order Manager Application

Requests Quotes Order List Find Orders Order Entry Returns Requirements Order Tasks Stats Reports Logout

<b>Order #WS10082 Information [ PDF ]</b> <a href="#">Approve Order</a>		<b>Contact Information</b>	
<b>Status</b>	Current Status: Created	<b>Name</b>	Charles E Customer ( 10022 ) ( <a href="#">Other Orders</a> )
<b>History</b>	Created - 2006-02-16 08:29:56.265	<b>Order Notification Email Address</b>	CECustomer@mvbox.info ( <a href="#">Send a confirmation email</a> )
<b>Date Ordered</b>	2006-02-16 08:29:56.265	<b>Shipping Destination Address</b>	To: Charles E Customer 53 West Center Street Unit 1546 Orem, UT 84058 USA ( <a href="#">lookup:whitepages.com</a> )
<b>Currency</b>	USD	<b>Shipment Information - 00001</b>	
<b>Sales Channel</b>	Web Channel	<b>Address</b>	53 West Center Street
<b>Product Store</b>	9000	<b>Method</b>	UPS Ground
<b>Origin Facility</b>	N/A	<b>Splitting Preference</b>	Please wait until the entire order is ready before shipping. <a href="#">Allow Split</a>
<b>Created by</b>	admin	<b>Gift?</b>	This order is not a gift
<b>Payment Information</b>		<a href="#">View/Edit Delivery Schedule Info</a>	
<b>Offline Payment</b>	<a href="#">Receive Payment</a>		

Product	Status	Quantity	Unit / List	Adjustments	Sub Total
GZ-8544 - Bio Gizmo <a href="#">Catalog</a> <a href="#">Ecommerce</a> <a href="#">Inventory</a> : ATP = 17, QOH = 18	Current: Created 2006-02-16 08:29:56.265 ; Created	Ordered: 1 Cancelled: 0 Remaining: 1	\$269.99 / \$270.00	\$0.00	\$269.99
<b>Adjustment: Sales Tax:</b> (Utah State Sales Tax) <b>Jurisdiction:</b> Utah [UT] <b>Rate:</b> 4.75					\$12.82
<b>Adjustment: Sales Tax:</b> (1% OFB_NA_Tax) <b>Jurisdiction:</b> Not Applicable [_NA_] <b>Rate:</b> 1					\$2.70
<b>Ship Group:</b> [00001] 53 West Center Street		1			
<b>Inventory:</b> [9003] <b>Ship Group:</b> 00001		1			
GZ-2644 - Round Gizmo <a href="#">Catalog</a> <a href="#">Ecommerce</a> <a href="#">Inventory</a> : ATP = 499, QOH = 504	Current: Created 2006-02-16 08:29:56.265 ; Created	Ordered: 2 Cancelled: 0 Remaining: 2	\$38.40 / \$48.00	\$0.00	\$76.80
<b>Adjustment: Sales Tax:</b> (Utah State Sales Tax) <b>Jurisdiction:</b> Utah [UT] <b>Rate:</b> 4.75					\$3.65
<b>Adjustment: Sales Tax:</b> (1% OFB_NA_Tax) <b>Jurisdiction:</b> Not Applicable [_NA_] <b>Rate:</b> 1					\$0.77
<b>Price Rule:</b> [9000:01] [PRODUCT_CATEGORY_ID: PROMOTIONS] [list:48.0; avgCost:48.0; margin:0.0] [type:PRICE_POL]					(\$9.60)
<b>Ship Group:</b> [00001] 53 West Center Street		2			
<b>Inventory:</b> [9000] <b>Ship Group:</b> 00001		1			
<b>Inventory:</b> [9001] <b>Ship Group:</b> 00001		1			
GZ-1006-1 - Ozen Gizmo (LGPL) <a href="#">Catalog</a> <a href="#">Ecommerce</a> <a href="#">Inventory</a> : ATP = 0, QOH = 6	Current: Created 2006-02-16 08:29:56.265 ; Created	Ordered: 1 Cancelled: 0 Remaining: 1	\$1.99 / \$5.99	(\$1.99)	\$0.00
<b>Adjustment: Promotion:</b> <a href="#">Test Gift with Amount of Specific Product</a>					(\$1.99)
<b>Ship Group:</b> [00001] 53 West Center Street		1			
<b>Inventory:</b> [9021] <b>Ship Group:</b> 00001		1			
GZ-1006-1 - Ozen Gizmo (LGPL) <a href="#">Catalog</a> <a href="#">Ecommerce</a> <a href="#">Inventory</a> : ATP = 0, QOH = 6	Current: Created 2006-02-16 08:29:56.265 ; Created	Ordered: 1 Cancelled: 0 Remaining: 1	\$1.99 / \$5.99	(\$1.99)	\$0.00
<b>Adjustment: Promotion:</b> <a href="#">Test Gift with Amount of Specific Product</a>					(\$1.99)
<b>Ship Group:</b> [00001] 53 West Center Street		1			
<b>Inventory:</b> [9021] <b>Ship Group:</b> 00001		1			
GZ-1006-1 - Ozen Gizmo (LGPL) <a href="#">Catalog</a> <a href="#">Ecommerce</a> <a href="#">Inventory</a> : ATP = 0, QOH = 6	Current: Created 2006-02-16 08:29:56.265 ; Created	Ordered: 1 Cancelled: 0 Remaining: 1	\$1.99 / \$5.99	(\$1.99)	\$0.00
<b>Adjustment: Promotion:</b> <a href="#">Test Gift with Total Amount of Product</a>					(\$1.99)
<b>Ship Group:</b> [00001] 53 West Center Street		1			
<b>Inventory:</b> [9021] <b>Ship Group:</b> 00001		1			
WG-1111 - Micro Chrome Widget <a href="#">Catalog</a> <a href="#">Ecommerce</a> <a href="#">Inventory</a> : ATP = 45, QOH = 50	Current: Created 2006-02-16 08:29:56.265 ; Created	Ordered: 1 Cancelled: 0 Remaining: 1	\$59.99 / \$60.00	(\$59.99)	\$0.00
<b>Adjustment: Promotion:</b> <a href="#">Test Promo 1</a>					(\$59.99)
<b>Ship Group:</b> [00001] 53 West Center Street		1			
<b>Inventory:</b> [9004] <b>Ship Group:</b> 00001		1			
<b>Promotion :</b>					(\$34.68)
<b>Shipping and Handling :</b>					\$5.80
<b>Items SubTotal</b>					\$346.79
<b>Total Other Order Adjustments</b>					(\$34.68)
<b>Total Shipping and Handling</b>					\$5.80
<b>Total Sales Tax</b>					\$13.94
<b>Total Due</b>					\$337.86

**Notes** [Create New](#)  
No notes for this order..



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Powered By OFBiz

The order is presented with an "Approve Order" link which you will click after confirming that payment has been or will be made.

**.3.3.1.4.2 PDF copy**

# Application Overview For Users

**Sales Order** not found

Date Ordered February 16, 2006  
Order # WS10082  
Current Status **Created**

**Shipping Destination Address :**

Charles E Customer  
53 West Center Street  
Unit 1546  
Orem, UT

Payment Information Offline Payment  
Shipment Information: GROUND

Product	Quantity	Unit / List	Sub Total
GZ-8544 - Big Gizmo	1	\$269.99	\$269.99
GZ-2644 - Round Gizmo	2	\$38.40	\$76.80
GZ-1006-1 - Open Gizmo (LGPL)	1	\$1.99	\$0.00
<i>Adjustments: (\$1.99)</i>			
GZ-1006-1 - Open Gizmo (LGPL)	1	\$1.99	\$0.00
<i>Adjustments: (\$1.99)</i>			
GZ-1006-1 - Open Gizmo (LGPL)	1	\$1.99	\$0.00
<i>Adjustments: (\$1.99)</i>			
WG-1111 - Micro Chrome Widget	1	\$59.99	\$0.00
<i>Adjustments: (\$59.99)</i>			
<b>Items SubTotal</b>			\$346.79
<b>Total Other Order</b>			(\$34.68)
<b>Adjustments</b>			
<b>Total Shipping and Handling</b>			\$5.80
<b>Total Sales Tax</b>			\$19.94
<b>Total Due</b>			\$337.86

**THANK YOU FOR YOUR PATRONAGE!**

Here is a good place to put policies and return information.

Page 1 of 1

This is the PDF version of the Order which can be sent to the customer.

### .3.3.2 Approved Order

#### .3.3.2.1 View of the approved order

Once the order is Approved (physically accomplished by clicking on the [Approve Order] link), the following sections of the Order screen should have your attention.

#### .3.3.2.2 Order Information Section

##### .3.3.2.2.1 Status and General Info

id:[12267] image:

Order #WS10082 Information [ PDF ]	
<b>Status History</b>	Current Status: Approved Approved - 2006-02-16 10:11:26.437 Created - 2006-02-16 08:29:56.265
<b>Date Ordered</b>	2006-02-16 08:29:56.265
<b>Currency</b>	USD
<b>Sales Channel</b>	Web Channel
<b>Product Store</b>	<a href="#">9000</a>
<b>Origin Facility</b>	N/A
<b>Created by</b>	<a href="#">admin</a>

Notice the links to PDF copy, Product Store and the party that processed the order (Created by).

##### .3.3.2.2.2 Discussion

Notice the Status History? This tells you when the order was placed, when it was approved and, later, where it is at in the shipping process. <P> The section labeled 'Created by' will give you the login ID of the person taking or making the order. This is who you need to talk with if there are any problems in the original order. Remember, it could be your customer service rep or it could be the customer herself if the order came in through ecommerce. <P> The link [PDF] will generate a PDF formatted copy as shown above.

#### .3.3.2.3 Payment Information Section

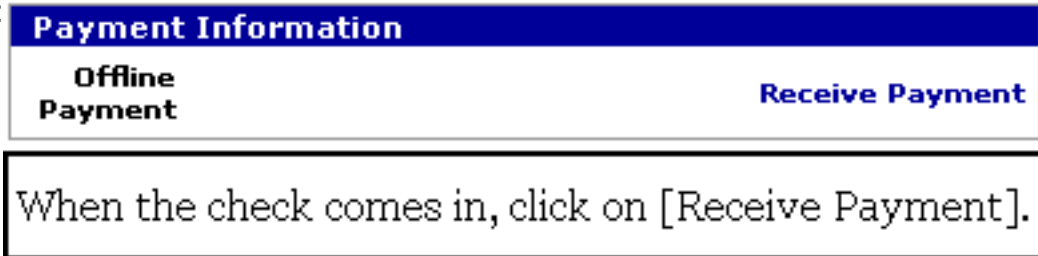
##### .3.3.2.3.1 Discussion

This section will reflect the type of payment selected by the customer. If Debit or Credit Card, the card number last 4 digits will show; if EFT (Electronic Funds Transfer - electronic checking withdrawal), the bank account

number will appear. <P> Shipment of the order against customer payment by check or money order will appear as shown below. It might be your practice to withhold shipment until payment is received. When it arrives, pull up the order and click on [Receive Payment] as also shown below.

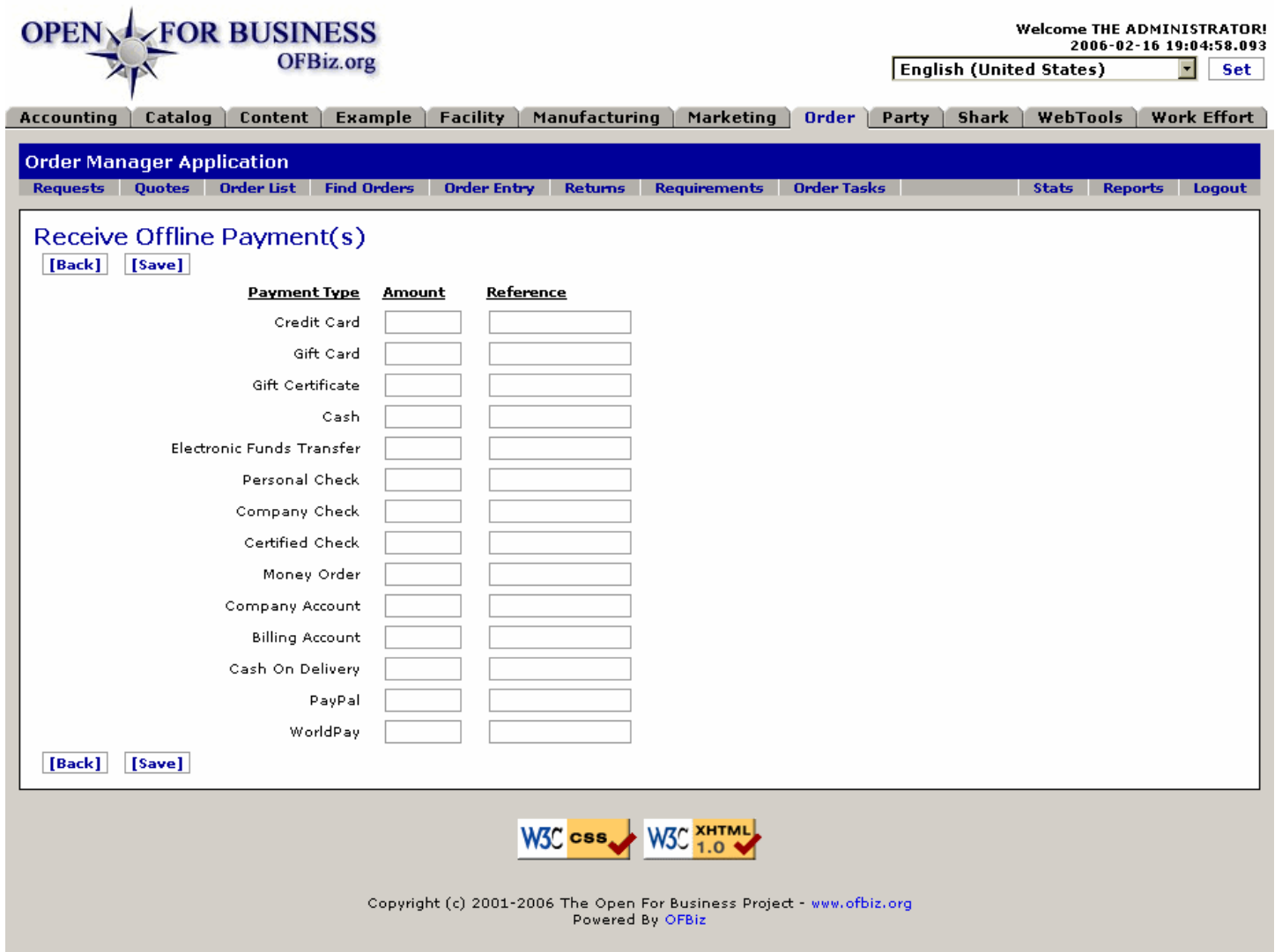
**.3.3.2.3.2 Where is the money coming from?**

id:[12268] image:



**.3.3.2.3.3 Receive Payment**

id:[12274] image:



From the Order screen, click on [Receive Payment] to bring up this screen; process any payment from non-electronic sources.

**.3.3.2.4 Order Items Section**

**.3.3.2.4.1 Discussion**

## Application Overview For Users

All the products, whether ordered or being sent as promos, are listed here. Note the many details shown in this section.

### .3.3.2.4.2 What do we need to ship?

id:[12269] image:

Order Items				Edit Items	
Product	Status	Quantity	Unit / List	Adjustments	Sub Total
WG-9943-S3 - Giant Widget S3 <a href="#">Catalog</a> <a href="#">Ecommerce</a> <a href="#">Inventory</a> : ATP = 8, QOH = 9 <b>Adjustment: Sales Tax:</b> (1% OFB_NA_Tax) <b>Jurisdiction:</b> Not Applicable [_NA_] <b>Rate:</b> 1	Current: Approved 2006-02-16 08:26:06.718 : Approved 2006-02-16 08:26:04.187 : Created	Ordered: 1 Cancelled: 0 Remaining: 1	\$440.00 / \$550.00	\$0.00	\$440.00
<b>Price Rule:</b> [9000:01] [PRODUCT_CATEGORY_IDIsPROMOTIONS] [list:550.0;avgCost:550.0;margin:0.0] [type:PRICE_POL]				(\$110.00)	
<b>Ship Group:</b> [00001] 1313 Ave. Z		1			
<b>Inventory:</b> <a href="#">9012</a> <b>Ship Group:</b> 00001		1			
WG-1111 - Micro Chrome Widget <a href="#">Catalog</a> <a href="#">Ecommerce</a> <a href="#">Inventory</a> : ATP = 45, QOH = 50	Current: Approved 2006-02-16 08:26:06.718 : Approved 2006-02-16 08:26:04.187 : Created	Ordered: 1 Cancelled: 0 Remaining: 1	\$59.99 / \$60.00	(\$59.99)	\$0.00
<b>Adjustment: Promotion:</b> <a href="#">Test Promo 1</a>				(\$59.99)	
<b>Ship Group:</b> [00001] 1313 Ave. Z		1			
<b>Inventory:</b> <a href="#">9004</a> <b>Ship Group:</b> 00001		1			
				<b>Promotion :</b>	(\$44.00)
				<b>Shipping and Handling :</b>	\$9.80
				<b>Items SubTotal</b>	\$440.00
				<b>Total Other Order Adjustments</b>	(\$44.00)
				<b>Total Shipping and Handling</b>	\$9.80
				<b>Total Sales Tax</b>	\$4.40
				<b>Total Due</b>	\$410.20

Each product has its own subsection. Click [Edit Items] for a working view where you can make changes.

### .3.3.2.4.3 Product Information links

Click on the [Catalog] or the [Ecommerce] link to get detailed information about the product from either of those sources.

### .3.3.2.4.4 Status

The first line gives the current status. Beneath that is the history of status changes. <P> Beneath the Status you will see Adjustments. Jurisdictions and rates are given for taxes applied. Amounts of the adjustment are shown in the column to the right. <P> Beneath Adjustments is the Price Rule applied to determine the effective price for the item. <P> Beneath Price Rule (or beneath Adjustments if there is no rule) you will see the Ship Groups listed. If the order was being split between two or more recipients, each would have its own Ship Group with the quantity going to each one being listed. In this instance, there is only one destination so there is only one Ship Group. <P> Inventory is very important. This shows the Inventory ID for the item and whether enough inventory exists to fill the order. Here the Inventory number given matches the order quantity, indicating sufficient inventory to fulfill the order.

### .3.3.2.4.5 Pricing and adjustments information

To the right in this section is all the financial details on each item. When taking back a return, be sure that no more is credited to the customer than what the order shows for a charge.

### .3.3.2.5 Notes Section

Notes		Create New
<b>By:</b> ADMINISTRATOR, THE <b>At:</b> 2006-02-16 19:19:19.671	Sent a check the day we created the order; should arrive Monday.	Internal Note (Not Printed)

Notes included here are for company employees to pass on information regarding this order.

### .3.3.2.6 Shipment Information Section

#### .3.3.2.6.1 Steps for shipping the order start here.

id:[12270] image:

Shipment Information - 00001	
<b>Address</b>	53 West Center Street
<b>Method</b>	UPS Ground
<b>Splitting Preference</b>	Please wait until the entire order is ready before shipping. <a href="#">Allow Split</a>
<b>Gift?</b>	This order is not a gift
<a href="#">Quick-Ship Entire Order</a>	
<a href="#">Pack Shipment For Ship Group [00001]</a> <a href="#">New Shipment For Ship Group [00001]</a>	
<a href="#">View/Edit Delivery Schedule Info</a>	

This section is very important for completing the order.

#### .3.3.2.6.2 Splitting

Remember there are two different uses of the word 'Splitting' and you need to know which meaning is being used. When the phrase 'Splitting Preferences' is used here we mean: <I>Does the customer want a part of his order to be shipped as soon as any portion is available, allowing the delayed balance to follow at a later date? </I>If splitting is not desired, all elements of the order must be gathered together for a unified shipment. <p> In this order as shown, if you were to click on the link [Allow Split], you would reverse the customer's original choice to wait for all items in one order. Do NOT select that link unless the customer has informed you of a change in her former preference!<P> When the next item is considered, 'Ship Group,' we would be looking at a Split Order with part of it going to one destination and the other part to another if there were two Ship Groups indicated. As the order in this example shows only one Ship Group, you can know that all items are destined for the same location.

#### .3.3.2.6.3 Quick-Ship Entire Order link

[Quick Ship Entire Order] is a powerful link built on a great many assumptions that everything needful to complete the order is in place, including financial arrangements, inventory, manpower to fulfill the order, etc. This powerful action will by-pass many of the normal processing screens, accomplishing most steps behind the scenes. See the topic <I>QuickShip Fulfillment Path </I>discussed below.

#### .3.3.2.6.4 Pack Shipment For Ship Group ... link

Initiates the preparation of packages for shipping the order under the Facility Manager. This is just one of many screens where this step can be triggered. See the discussion below under the topic <I>Warehouse Fulfillment

Path. </l>

### .3.3.2.6.5 New Shipment for Shipment Group ... link

The link [New Shipment for Ship Group {00001}] will bring up a working screen in the Facility Manager to allow you to begin the <B>Warehouse Path</B>, discussed below.

### .3.3.2.6.6 View/Edit Delivery Schedule Info

id:[12283] image:

The screenshot displays the OFBiz Order Manager Application interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. Below this is a sub-navigation bar for the Order Manager Application, including Requests, Quotes, Find Orders, Order Entry, Returns, Requirements, Order Tasks, Stats, Reports, and Logout. The main content area is titled "Delivery Schedule Info" and contains a form with the following fields:

- Estimated Ready Date:  (with a calendar icon)
- Cartons:
- Skids Pallets:
- Units Pieces:
- Total Cubic Size:
- Cubic Measurement:
- Total Weight:
- Weight Measurement:
- Status:

An "Update" button is located at the bottom of the form. A "[View Order]" link is visible in the top right corner of the form area. Below the form, there are logos for W3C CSS and W3C XHTML 1.0. The footer contains the copyright notice: "Copyright (c) 2001-2005 The Open For Business Project - www.ofbiz.org Powered By OFBiz".

Still within the Order Manager, this screen provides for entering known shipping information.

## .3.3.3 QuickShip Fulfillment Path

### .3.3.3.1 Discussion

QuickShip presumes several things: <p> 1. That inventory is on hand and ready to be shipped or taken from the premises by the purchaser.<p> 2. That third parties, such a shipping company, a warehouseman, a picker, etc., are not needed to fulfill the order.<p> 3. That the method of payment is acceptable: that the customer has paid or that credit has been extended for payment to be received later.<p> Essentially, QuickShip allows OFBiz to bypass all of the procedures for identifying, picking, packing, billing and shipping so that the package is immediately dispatched.

### .3.3.3.2 Click on 'Quick-Ship Entire Order'



<b>Shipment Information - 00001</b>	
<b>Address</b>	53 West Center Street
<b>Method</b>	UPS Ground
<b>Splitting Preference</b>	Please wait until the entire order is ready before shipping. <a href="#">Allow Split</a>
<b>Gift?</b>	This order is not a gift
<a href="#">Quick-Ship Entire Order</a>	
<a href="#">Pack Shipment For Ship Group [00001]</a> <a href="#">New Shipment For Ship Group [00001]</a>	
<a href="#">View/Edit Delivery Schedule Info</a>	

A click on "Quick-Ship Entire Order" will bypass all processing screens, automating the effort.

### .3.3.3.3 Confirm Quick-Ship Success



Welcome THE ADMINISTRATOR!  
2006-02-16 20:18:49.671

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools Work Effort

## Order Manager Application

Requests Quotes Order List Find Orders Order Entry Returns Requirements Order Tasks Stats Reports Logout

### The Following Occurred:

- The action was performed successfully.
- Created shipment with ID [10050] for ship group ID [00001] for facility ID [WebStoreWarehouse]

Order #WS10082 Information [ PDF ]		Contact Information	
<b>Status History</b>	Current Status: Completed Completed - 2006-02-16 20:18:35.281 Approved - 2006-02-16 10:11:26.437 Created - 2006-02-16 08:29:56.265	<b>Name</b>	Charles E Customer ( <input type="button" value="10022"/> ) ( <input type="button" value="Other Orders"/> )
<b>Date Ordered</b>	2006-02-16 08:29:56.265	<b>Order Notification Email Address</b>	CECustomer@mybox.info ( <input type="button" value="Send a confirmation email"/> )
<b>Currency</b>	USD	<b>Shipping Destination Address</b>	To: Charles E Customer 53 West Center Street Unit 1546 Orem, UT 84058 USA ( <input type="button" value="lookup:whitepages.com"/> )
<b>Sales Channel</b>	Web Channel	<b>Shipment Information - 00001</b>	
<b>Product Store</b>	<input type="button" value="9000"/>	<b>Address</b>	53 West Center Street
<b>Origin Facility</b>	N/A	<b>Method</b>	UPS Ground
<b>Created by</b>	<input type="button" value="admin"/>	<b>Splitting Preference</b>	Please wait until the entire order is ready before shipping.
<b>Payment Information</b>		<b>Gift?</b>	This order is not a gift
<b>Offline Payment</b>	<input type="button" value="Receive Payment"/>	<b>Shipments</b>	# <input type="button" value="10050"/> <input type="button" value="Packing Slip"/>
<b>Invoices</b>	# <input type="button" value="10060"/>	<input type="button" value="Quick-Refund Entire Order"/> <input type="button" value="Create Return"/>	

Top half of the Sales Order screen following a successful Quick-Ship operation. See details discussed below.

### .3.3.3.4 What this screen shows

#### .3.3.3.4.1 Under the ' Order #WS10082 Information' section

<B>Status History</B> Current Status: Completed <br> Completed - 2006-02-16 20:18:35.281 <br> Approved - 2006-02-16 10:11:26.437 <br> Created - 2006-02-16 08:29:56.265

#### .3.3.3.4.2 Under the Payment Information section

<B>Invoices #</B> [10060] has been added in a new sub-section. <br> Click on the Invoice # to view the invoice in the Accounting Manager.

#### .3.3.3.4.3 Under the Shipment Information section

-1.) <B>Splitting Preference</B> no longer presents an opportunity to change the preference; chosen method is displayed. <P> -2.) <B>Shipments</B> affords two links: <br> ---- # [10050] --> Facility Manager > Shipments tab > View Shipment document 10050. <br> ---- [Packing Slip] generates a PDF document for including with the order as a Packing Slip. See below. <P> -3.) [Quick-Refund Entire Order] link could be used to immediately reverse a completed order which had been charged to a Credit Card, an Electronics Fund Transfer (EFT), or a Gift Card. Best used before the items leave the Facility. If already shipped, use the [Create Return] link. <p> -4.) [Create Return] brings up a working screen to begin the complex process of bringing products from the customer back into your facility, reversing charges, etc.

**.3.3.3.4 Packing Slip printed**

id:[14268] image:

**Shipment #10050**

Order #WS10082 / 00001

Shipping Address	Shipping Method	Handling Instructions
To: Charles E Customer 53 West Center Street Unit 1546 Orem, UT 84058 USA	UPS GROUND	

Product	Quantity Requested	Quantity Shipped
Big Gizmo [GZ-8544]	1	1
Round Gizmo [GZ-2644]	2	1
Round Gizmo [GZ-2644]	2	1
Open Gizmo (LGPL) [GZ-1006-1]	1	1
Open Gizmo (LGPL) [GZ-1006-1]	1	1
Open Gizmo (LGPL) [GZ-1006-1]	1	1
Micro Chrome Widget [WG-1111]	1	1

Complete with a printed bar code, the Packing Slip is generated as a PDF file.

**.3.3.3.5 View the Shipment Document****.3.3.3.5.1 The Quick-Ship Shipment document**

Even though the 'Shipment' did not follow a complete course through the Facility Manager and elsewhere, paperwork is still needed to confirm stock deletions and track where products have gone. <p> You can see the highlighted 'Shipments #' link. Click on that number to see the details as shown immediately below.

**.3.3.3.5.2 View Shipment Details**

# Application Overview For Users



Welcome THE ADMINISTRATOR!  
2006-02-16 21:51:52.296

English (United States)

Accounting Catalog Content Example **Facility** Manufacturing Marketing Order Party Shark WebTools WorkEffort

## Facility Manager Application

Main Facilities Facility Groups Shipments Reports Logout

### Generate Shipment Manifest Report

**Shipment Id** 10050  
**Shipment Type** Sales Shipment  
**Status** Shipped  
**Primary Order ID** [WS10082](#)  
**Primary Ship Group Seq ID** 00001  
**Estimated Dates** **Ready: Ship: Arrival:**  
**Latest Cancel Date**  
**Estimated Ship Cost** 5.8  
**Handling Instructions**  
**Facilities** **Origin:** Web Store Warehouse [WebStoreWarehouse]  
**Destination:** []  
**Parties** **To:** Charles E Customer [10022] **From:** []  
**Addresses** **Origin:** 9200 [To : Company XYZ, Attn : ZJAA, 2003 Open Blvd, , Orem, UT, 84058, USA]  
**Destination:** 10016 [To : Charles E Customer, Attn : , 53 West Center Street, Unit 1546, Orem, UT, 84058, USA]  
**Phone Numbers** **Origin:** 9201  
**Destination:**  
**Created** By [admin] On 2006-02-16 20:18:26.906  
**Last Updated** By [admin] On 2006-02-16 20:18:45.609

Item	Quantity				
00001	1	Big Gizmo [ <a href="#">GZ-8544</a> ]			
	1	Order Item : <a href="#">WS10082</a> :00001	Inventory : <a href="#">9003</a>	2006-02-16 20:18:32.906	Future Party / RoleList
	1	Package :00001			
00002	2	Round Gizmo [ <a href="#">GZ-2644</a> ]			
	1	Order Item : <a href="#">WS10082</a> :00002	Inventory : <a href="#">9000</a>	2006-02-16 20:18:34.562	Future Party / RoleList
	1	Order Item : <a href="#">WS10082</a> :00002	Inventory : <a href="#">9001</a>	2006-02-16 20:18:34.625	Future Party / RoleList
	2	Package :00001			
00003	3	Open Gizmo (LGPL) [ <a href="#">GZ-1006-1</a> ]			
	1	Order Item : <a href="#">WS10082</a> :00003	Inventory : <a href="#">9021</a>	2006-02-16 20:18:34.750	Future Party / RoleList
	1	Order Item : <a href="#">WS10082</a> :00004	Inventory : <a href="#">9021</a>	2006-02-16 20:18:34.906	Future Party / RoleList
	1	Order Item : <a href="#">WS10082</a> :00005	Inventory : <a href="#">9021</a>	2006-02-16 20:18:35.031	Future Party / RoleList
	3	Package :00001			
00004	1	Micro Chrome Widget [ <a href="#">WG-1111</a> ]			
	1	Order Item : <a href="#">WS10082</a> :00006	Inventory : <a href="#">9004</a>	2006-02-16 20:18:35.171	Future Party / RoleList
	1	Package :00001			

Package	Created	Weight :	Weight Unit :
00001	2006-02-16 20:18:38.328		
	Item :00001	Quantity :1	
	Item :00002	Quantity :2	
	Item :00003	Quantity :3	
	Item :00004	Quantity :1	

Segment	Carrier Shipment Method Origin-Destination Facility Origin-Destination Address ID Origin-Destination Phone ID	Carrier Status Tracking Number Estimated (Start-Arrive) Actual (Start-Arrive)	Billing Weight & UOM Currency UOM Actual Transport Actual Services Actual Other Actual Total
00001	UPS [UPS] Ground Origin : Web Store Warehouse [WebStoreWarehouse] Dest : [] Origin : <b>9200</b> [To : Company XYZ, Attn : ZJAA, 2003 Open Blvd, , Orem, UT, 84058, USA] Dest: <b>10016</b> [To : Charles E Customer, Attn : , 53 West Center Street, Unit 1546, Orem, UT, 84058, USA] Origin : <b>9201</b> [ 801 555-5555] Dest :	[ - ] [ - ]	[]



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If you look at the third line down from the top, "Status:" you will see that the Status is "Shipped."

### **.3.3.3.5.3 Further discussion**

Insomuch as shipping methods were specified in the ordering process (UPS Ground), this example is somewhat skewed. If you knew the customer was going to retrieve the products personally, you would so indicate in the original order entry process. <P> You will notice in the document that inventory adjustments and other issues are all presented. You can bore down into any of the highlighted links or select one of the sub-tabs to bring up further details about the order, the products, the customer, etc.<P> A final link to follow is the 'Generate Shipment Manifest Report' which produces a PDF form to send with the purchaser or to serve as a hard copy for your internal purposes. An example is given below.

### **.3.3.3.5.4 Shipment Report PDF**

Manifest for Shipment #10010

<u>Product [ID]</u>	<u>Shipment</u>	<u>Package</u>	<u>Issued</u>	<u>OrderItem</u>
<b>Route Segment 00001</b>	Carrier: [UPS]		UPS	Method: Ground
From: Company XYZ			To: Sherry Shopper	
Attn: ZJAA			Attn:	
2003 Open Blvd			123 Center Street	
Orem, UT 84058			Pleasant Grove, UT 84055	
USA			USA	
801 555-5555				

**Package 00001**

Round Gizmo [GZ-2644]	1.0	1.0	1.0	WS10020:
Square Gizmo [GZ-2002]	1.0	1.0	1.0	WS10020:
Tiny Chrome Widget [WG-5569]	2.0	2.0	2.0	WS10020:
Micro Chrome Widget [WG-1111]	1.0	1.0	1.0	WS10020:

### **.3.3.4 Warehouse Fulfillment Path**

#### **.3.3.4.1 Generate Shipment from the Order**

The Sales Order process is not complete until the Shipment is generated. This is begun by clicking on the link [New Shipment for Ship Group #]. <p> The following screen in the Facility Manager is sometimes brought up with the Order Number and little else completed in it. See the discussion following.

#### **.3.3.4.2 Shipment Generated in the Facility Manager**



Facility Manager Application

The Following Occurred:

- The action was performed successfully.

**Shipment Id**  -[This cannot be changed without re-creating the Shipment]-  
**Shipment type Id**   
**Status Id**   
**Primary Order ID**   
**Primary Ship Group Seq Id**   
**Estimated Ready Date**   
**Estimated Ship Date**   
**Estimated Ship Work Eff Id**   
**Estimated Arrival Date**   
**Estimated Arrival Work Eff Id**   
**Latest Cancel Date**   
**Estimated Ship Cost**   
**Currency Uom Id**   
**Handling Instructions**   
**Origin Facility [WS10090]**   
**Destination Facility**   
**Origin Postal Address Id**  -[To: Company XYZ, Attn: ZJAA, 2003 Open Blvd, , Orem, UT, 84058, USA]-  
**Origin Phone Number Id**  -[ 801 555-5555]-  
**Destination Postal Address Id**  -[To: Sherry Shopper, Attn: , 1313 Ave. Z, , Scottsbluff, NE, 69361, USA]-  
**Destination Phone Number Id**  -[ ]-  
**To Party**  -[Sherry Shopper ]-  
**From Party**  -[ ]-  
**Created Date** 2006-02-17 09:21:21.984  
**Created By User Login** admin  
**Last Modified Date** 2006-02-17 09:21:23.765  
**Last Modified By User Login** admin



After you identify this as a Sales Shipment and complete as many details as you can, click [Update] to create the Shipment.



### .3.3.4.3 Edit the Shipment

When you generate the Shipment by clicking on 'New Shipment For Ship Group [00001]' link, your screen might not appear as completed as shown above. Before you enter information in the address fields, for example, try clicking on the [Submit] or [Update] link at the bottom of the screen. The system usually will retrieve these addresses from the Sales Order and from the Party Profile to enter the address ID numbers as you see here.<P> The Status ID wil generally be updated as you go through the following steps. That Status includes Scheduled, Picked, Packed, etc. <P> If the Order had a desired delivery date, or if you have a good idea what the shipping dates could or should be, here and now is a good time to complete them. Those dates would be the Ready date, the Ship date and the Receive date. The Latest Cancel Date is the last possible moment the order can be canceled before it is committed to the shipping company. <P> Destination Facility would seldom be used for retail customers. This would be for wholesale customers or established high-volume Business to Business clients.

### .3.3.4.4 Create a Shipment Plan

id:[12297] image:

The screenshot shows the 'Facility Manager Application' interface. At the top, there is a navigation bar with tabs for Accounting, Catalog, Content, Example, Facility (selected), Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. A header area includes the 'OPEN FOR BUSINESS OFBiz.org' logo, a welcome message for 'THE ADMINISTRATOR!' with the timestamp '2006-02-17 11:10:44.343', and a language dropdown set to 'English (United States)' with a 'Set' button. Below the navigation bar, the 'Facility Manager Application' title is displayed, followed by sub-tabs: Main, Facilities, Facility Groups, and Shipments (selected). A secondary navigation bar contains buttons for View, Edit, Shipment Plan (selected), Order Items, Items, Packages, and Route Segments. The main content area is titled 'Shipment Plan' and features an 'Order ID' input field with the value 'WS10090' and a 'Submit' button. Below this is a table with the following columns: Shipment Item Seq Id, Order ID, Order Item, Product ID, Quantity, Issued Quantity, Tot Ordered Quantity, Not Available, Tot Planned Quantity, Tot Issued Quantity, Weight, UOM, Volume, and UOM. The table currently shows 'Total weight: 0' and 'Total volume: 0'. A 'Shipment Plan --> Order Items' button is located at the bottom of the table area. At the bottom of the page, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'. A final instruction box at the bottom states: 'Confirm the Order ID, then click on [Submit] to begin a Shipment Plan.'

### .3.3.4.5 Confirm the Shipment Plan



Facility Manager Application

Shipment Plan

Order ID

Order ID	Order Item	Product ID	Ordered Quantity	Planned Quantity	Issued Quantity	Quantity	Weight	UOM	Volume	UOM
WS10090	00001	GZ-9290	1.0	0	0	<input type="text" value="1"/>	0		0	
WS10090	00002	GZ-5005	1.0	0	0	<input type="text" value="1"/>	0		0	
WS10090	00003	WG-1111	1.0	0	0	<input type="text" value="1"/>	2		0	
WS10090	00004	GZ-1006-2	1.0	0	0	<input type="text" value="1"/>	0		0	
WS10090	00005	WG-1111	1.0	0	0	<input type="text" value="1"/>	2		0	

Shipment Item Seq Id	Order ID	Order Item	Product ID	Quantity	Issued Quantity	Tot Ordered Quantity	Not Available	Tot Planned Quantity	Tot Issued Quantity	Weight	UOM	Volume	UOM
Total weight: 0													
Total volume: 0													



Confirm the information shown, then click on [Shipment Plan --> Order Items] to proceed.

**.3.3.4.6 Order Items selection step**



Welcome THE ADMINISTRATOR!  
2006-02-17 11:43:14.281

English (United States)

Accounting Catalog Content Example **Facility** Manufacturing Marketing Order Party Shark WebTools WorkEffort

**Facility Manager Application**

Main Facilities Facility Groups Shipments Reports Logout

Order ID :  Ship Group ID :

Add Items to Shipment: [10060]; from Order: [], Ship Group: [00001]

Order ID/Ship Group/Order Item	Product	Items Issued or Reserved	[Issued + Reserved=Total]=Ordered	Reserved	Not Available	Issue	Submit ? All <input checked="" type="checkbox"/>
							<input type="button" value="Issue All"/>



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Confirm that the Order ID number and Ship Group ID number are entered, then click [Select].

**.3.3.4.7 Submit and Issue items in the order**



**Facility Manager Application**

Order ID :

**Add Items to Shipment: [10060]; from Order: [WS10090], Ship Group: [00001]**

NOTE: Order Type is Sales.

Origin Facility is: Web Store Warehouse [WebStoreWarehouse]

NOTE: Order Status is Approved.

Order ID/Ship Group/Order Item	Product	Items Issued or Reserved	[Issued + Reserved=Total]=Ordered	Reserved	Not Available	Issue	Submit ? All <input checked="" type="checkbox"/>
WS10090 / 00001 / 00001	His/Her Gizmo [GZ-9290]		[0 + 1 = 1] = 1				
		10000 [Web Store Warehouse]		1	1	<input type="text" value="0"/>	<input checked="" type="checkbox"/>
WS10090 / 00001 / 00002	Purple Gizmo [GZ-5005]		[0 + 1 = 1] = 1				
		10030 [Web Store Warehouse]		1		<input type="text" value="1"/>	<input checked="" type="checkbox"/>
WS10090 / 00001 / 00003	Micro Chrome Widget [WG-1111]		[0 + 1 = 1] = 1				
		9004 [Web Store Warehouse]		1		<input type="text" value="1"/>	<input checked="" type="checkbox"/>
WS10090 / 00001 / 00004	Open Gizmo (GPL) [GZ-1006-2]		[0 + 1 = 1] = 1				
		9022 [Web Store Warehouse]		1		<input type="text" value="1"/>	<input checked="" type="checkbox"/>
WS10090 / 00001 / 00005	Micro Chrome Widget [WG-1111]		[0 + 1 = 1] = 1				
		9004 [Web Store Warehouse]		1		<input type="text" value="1"/>	<input checked="" type="checkbox"/>



Step 1: Click the checkbox to [Submit] each selected Item or check [Submit All]. Step 2: click [Issue All].

### .3.3.4.8 Edit items as needed



**Facility Manager Application**

Item			Quantity			
00001	Purple Gizmo [ GZ-5005 ]		1			<a href="#">Delete</a>
	Order Item :	WS10090 :00002	Inventory :	10030	1	2006-02-17 12:35:17.078 Future Party / RoleList
	Add to Package :	New		1	<input type="button" value="Add"/>	
00002	Micro Chrome Widget [ WG-1111 ]		2			<a href="#">Delete</a>
	Order Item :	WS10090 :00003	Inventory :	9004	1	2006-02-17 12:35:18.718 Future Party / RoleList
	Order Item :	WS10090 :00005	Inventory :	9004	1	2006-02-17 12:35:18.984 Future Party / RoleList
	Add to Package :	New		2	<input type="button" value="Add"/>	
00003	Open Gizmo (GPL) [ GZ-1006-2 ]		1			<a href="#">Delete</a>
	Order Item :	WS10090 :00004	Inventory :	9022	1	2006-02-17 12:35:18.890 Future Party / RoleList
	Add to Package :	New		1	<input type="button" value="Add"/>	
New Item :	Product ID :	<input type="text"/>		0		Description : <input type="text"/> <input type="button" value="Create"/>



After Items are issued, use the Items sub-tab to make changes if needed.

### .3.3.4.9 Pick and Pack the shipment

#### .3.3.4.9.1 Discussion

There are several approaches to having the products Picked and Packed in the system. One method is to open the Facility Manager, click on the Facilities tab, select your Facility, then click on the Picking tab. After identifying and submitting orders that need Picking to the floor, you move over to the Packing tab. This one is more individualized; you can see the screen shot below. You must enter the Order number, then enter the Product ID for each item as it is accepted. A much easier method is right there in the Order Manager. Pull up the Order and look under Shipment Information. See the link labeled Pack Shipment For Ship Group [00001]? Click on that and you will see the second screen below.

#### .3.3.4.9.2 Pack from the Facility Manager



**Facility Manager Application**

Main | Facilities | Facility Groups | Shipments | Reports | Logout

**Pack Order in Web Store Warehouse [ID:WebStoreWarehouse]**

Order #  /  Hide Grid:

Order # WS10090 / ShipGroup # 0001  
WS10090 / 0001

Product #  @

Current Package Sequence: 2

**Handling Instructions:**



Enter each item and proceed through [Next Package] until you are ready to click [Complete].

**.3.3.4.9.3 Pack from the View Order link to Facility Manager**



Facility Manager Application

Pack Order in Web Store Warehouse [ID:WebStoreWarehouse]

Order #  /  Hide Grid:

Order #WS10090 / ShipGroup #00001  
WS10090 / 00001

**Ship-To Address:**  
To: Sherry Shopper  
1313 Ave. Z  
Scottsbluff, NE 69361  
USA

**Carrier/Shipping Method:**  
DHL SECOND\_DAY

**Shipping Instructions:**

Product #  @

Current Package Sequence: 2

Item #	SKU	Description	Ordered Qty	Packed Qty	Pack Qty	Package
<input type="checkbox"/>	00001	GZ-9290 His/Her Gizmo	1	0	<input type="text" value="1"/>	<input type="button" value="Package 1"/>
<input type="checkbox"/>	00002	GZ-5005 Purple Gizmo	1	0	<input type="text" value="1"/>	<input type="button" value="Package 1"/>
<input type="checkbox"/>	00003	WG-1111 Micro Chrome Widget	1	0	<input type="text" value="1"/>	<input type="button" value="Package 1"/>
<input type="checkbox"/>	00004	GZ-1006-2 Open Gizmo (GPL)	1	0	<input type="text" value="1"/>	<input type="button" value="Package 1"/>
<input type="checkbox"/>	00005	WG-1111 Micro Chrome Widget	1	0	<input type="text" value="1"/>	<input type="button" value="Package 1"/>

**Handling Instructions:**



Same Pack Order screen, but the items are displayed when coming in through the Order link.

### .3.3.4.10 Status through Picked and Packed



**Facility Manager Application**

**View** | **Edit** | **Shipment Plan** | **Order Items** | **Items** | **Packages** | **Route Segments**

**Generate Shipment Manifest Report**

**Shipment Id** 10061  
**Shipment Type** Sales Shipment  
**Status** Shipped  
**Primary Order ID** [WS10090](#)  
**Primary Ship Group Seq ID** 00001  
**Estimated Dates** **Ready: Ship: Arrival:**  
**Latest Cancel Date**  
**Estimated Ship Cost** 5.8  
**Handling Instructions**  
**Facilities** **Origin:** Web Store Warehouse [WebStoreWarehouse]  
**Destination:** []  
**Parties** **To:** Sherry Shopper [10011] **From:** []  
**Addresses** **Origin:** 9200 [To : Company XYZ, Attn : ZJAA, 2003 Open Blvd, , Orem, UT, 84058, USA]  
**Destination:** 10002 [To : Sherry Shopper, Attn : , 1313 Ave. Z, , Scottsbluff, NE, 69361, USA]  
**Phone Numbers** **Origin:** 9201  
**Destination:**  
**Created** By [admin] On 2006-02-17 15:08:48.25  
**Last Updated** By [admin] On 2006-02-17 15:08:55.687

Item		Quantity		
00001	His/Her Gizmo [ <a href="#">GZ-9290</a> ]	1		
	Order Item : <a href="#">WS10090</a> :00001	Inventory : <b>10000</b>	1	2006-02-17 15:08:49.859
	Package :00001		1	Future Party / RoleList

Package	Created		
00001	2006-02-17 15:08:50.531	Weight :	Weight Unit :
	Item :00001	Quantity :1	

Segment	Carrier Shipment Method Origin-Destination Facility Origin-Destination Address ID Origin-Destination Phone ID	Carrier Status Tracking Number Estimated (Start-Arrive) Actual (Start-Arrive)	Billing Weight & UOM Currency UOM Actual Transport Actual Services Actual Other Actual Total
00001	DHL [DHL] Second Day Origin : Web Store Warehouse [WebStoreWarehouse] Dest : [] Origin : <b>9200</b> [To : Company XYZ, Attn : ZJAA, 2003 Open Blvd, , Orem, UT, 84058, USA] Dest: <b>10002</b> [To : Sherry Shopper, Attn : , 1313 Ave. Z, , Scottsbluff, NE, 69361, USA] Origin : <b>9201</b> [ 801 555-5555] Dest :	[ - ] [ - ]	[]



After completing the Inventory Transfers, performing the Pick, then calling for the Pack, our View of the Order looks like this. Notice Status now says "Shipped."

### .3.3.4.11 Shipping details





Facility Manager Application

Segment	Carrier Shipment Method Origin-Destination Facility Origin-Destination Address ID Origin-Destination Phone ID	Carrier Status Tracking Number Estimated (Start-Arrive) Actual (Start-Arrive)	Billing Weight & UOM Currency UOM Actual Transport Actual Services Actual Other Actual Total		
00001	DHL [DHL] Second Day Web Store Warehouse [WebStoreWarehouse] 9200 [To: Company XYZ, Attn: ZJAA, 2003 Open Blvd, , Orem, UT, 84058, USA] 10002 [To: Sherry Shopper,Attn: , 1313 Ave. Z, , Scottsbluff, NE, 69361, USA] 9201 [ 801 555-5555]	Confirm Shipment with DHL Confirm [Confirmed] 12-3456-7K2478 2006-02-17 15:00:00.0 2006-02-21 15:13:22.843 2006-02-17 15:13:22.843	[Input Fields]	<input type="button" value="Update"/> <input type="button" value="Delete"/>	
New Segment :	[Input Fields]	[Input Fields]	[Input Fields]	<input type="button" value="Create"/>	



Use the Route Segments sub-tab to complete the details with your Carrier company.

### .3.4 Accounting Element

#### .3.4.1 Discussion

The Accounting manager keeps track of financial charges, credit card processes, and receipts of payment. The link from the Order Manager to the Accounting Manager is the Invoice Number, generated when the Order is processed.

#### .3.4.2 From the Sales Order

**Payment Information**

Offline Payment [Receive Payment](#)

---

Invoices #

Click on the Invoice number to view the Invoice under the Accounting Manager, or click on [Receive Payment] to process.

### .3.4.3 From the Accounting Manager - Find Invoice screen

id:[14278] image:

**OPEN FOR BUSINESS**  
OFBiz.org

Welcome THE ADMINISTRATOR!  
2006-02-24 10:21:44.421

English (United States) [Set](#)

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

**Accounting Manager Application**

Main | Agreements | Billing Accounts | Invoices | Payments | Chart of Accounts | Fixed Assets | Tax Authorities | Transactions | Logout

**Find Invoices**

Invoice Id   Equals  Begins With  Contains  Is Empty  Ignore Case

Description   Equals  Begins With  Contains  Is Empty  Ignore Case

Invoice Type Id  Status Id

Party Id From  Party Id To

[Lookup](#)

[Create New Invoice](#)

Invoice Id	Invoice Type Id	Invoice Date	Status	Description	Party Billed From	Party Billed To	Total	Paid
<a href="#">10030</a>	Sales	2006-01-20 06:06:48.734	Ready (Approved)		Your Company Name Here [Company]	Ready, Roger [10120]	\$463.42	\$0.00
<a href="#">10040</a>	Sales	2006-01-27 07:00:37.421	Ready (Approved)		Your Company Name Here [Company]	Mrs. Shopper, Sherry [10011]	\$117.38	\$117.37
<a href="#">10060</a>	Sales	2006-02-16 20:18:40.25	Ready (Approved)		Your Company Name Here [Company]	Customer, Charles E [10022]	\$337.83	\$0.00
<a href="#">10070</a>	Sales	2006-02-17 15:08:51.812	Ready (Approved)		Your Company Name Here [Company]	Mrs. Shopper, Sherry [10011]	\$91.93	\$0.00
<a href="#">10090</a>	Sales	2006-02-21 09:20:02.14	Ready (Approved)		Your Company Name Here [Company]	Mrs. Shopper, Sherry [10011]	\$138.84	\$0.00

W3C CSS  W3C XHTML 1.0

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To find an Invoice, use the search tool and then locate the invoice in the table. Here we looked for a Sales Type Invoice with a Ready or Approved Status.

### .3.4.4 Overview of the Invoice

# Application Overview For Users



Welcome THE ADMINISTRATOR!  
2006-02-24 10:44:52.468

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing Order Party Shark WebTools WorkEffort

## Accounting Manager Application

Main Agreements Billing Accounts Invoices Payments Chart of Accounts Fixed Assets Tax Authorities Transactions Logout

Overview Applications

### For: [ID:10060] Header Detailed Information

<b>Invoice Type Id</b> Sales	<b>Status Id</b> Ready (Approved)
<b>Description</b>	<b>Invoice Message</b>
<b>Party Billed From</b> Your Company Name Here [Company]	<b>Party Billed To</b> Customer, Charles E [10022]
<b>Role Type</b>	<b>Billing Acct</b>
<b>Invoice Date</b> 2006-02-16 20:18:40.25	<b>Due Date</b>
<b>Invoice Amount</b> \$337.83	<b>CommonCurrencyUom</b> USD

### Roles

Party Id	Name	Role Type Id	Percentage	Datetime Performed
10022	Charles Customer	Bill-To Customer		2006-02-16 20:18:40.625
10022	Charles Customer	End-User Customer		2006-02-16 20:18:40.843
10022	Charles Customer	Placing Customer		2006-02-16 20:18:40.843
10022	Charles Customer	Ship-To Customer		2006-02-16 20:18:40.843
Company	Wonderful Widgets & Gizmos	Bill-From Vendor		2006-02-16 20:18:40.859

### Status

Status	Status Date
Ready (Approved)	2006-02-16 20:18:44.296

Payments applied: 0, open: 337.83 USD

Item No.	Product Id	Description	Payment Amount	Payment Id	Amount Applied

### Items

Item No.	ItemType	Override GI Account	Inventry Item Id	Product Id	Product Feature Id	Uom Id	Taxable Flag	Quantity	Amount	Description	Tax Auth Party Id	Tax Auth Geo Id	Line Total
01	Invoice Finished Good Item		9003	GZ-8544				1	\$269.99	Big Gizmo			\$269.99
02	Invoice Item Sales Tax	224153		GZ-8544				1	\$12.82		UT_TAXMAN	UT	\$12.82
03	Invoice Item Sales Tax	224000		GZ-8544				1	\$2.70		_NA_	_NA_	\$2.70
04	Invoice Finished Good Item		9000	GZ-2644				1	\$38.40	Round Gizmo			\$38.40
05	Invoice Item Sales Tax	224153		GZ-2644				1	\$1.82		UT_TAXMAN	UT	\$1.82
06	Invoice Item Sales Tax	224000		GZ-2644				1	\$0.38		_NA_	_NA_	\$0.38
07	Invoice Finished Good Item		9001	GZ-2644				1	\$38.40	Round Gizmo			\$38.40
08	Invoice Item Sales Tax	224153		GZ-2644				1	\$1.82		UT_TAXMAN	UT	\$1.82
09	Invoice Item Sales Tax	224000		GZ-2644				1	\$0.38		_NA_	_NA_	\$0.38
10	Invoice Finished Good Item		9021	GZ-1006-1			Y	1	\$1.99	Open Gizmo (LGPL)			\$1.99
11	Invoice Item Promotion			GZ-1006-1			Y	1	(\$1.99)				(\$1.99)
12	Invoice Finished Good Item		9021	GZ-1006-1			Y	1	\$1.99	Open Gizmo (LGPL)			\$1.99
13	Invoice Item Promotion			GZ-1006-1			Y	1	(\$1.99)				(\$1.99)
14	Invoice Finished Good Item		9021	GZ-1006-1			Y	1	\$1.99	Open Gizmo (LGPL)			\$1.99
15	Invoice Item Promotion			GZ-1006-1			Y	1	(\$1.99)				(\$1.99)
16	Invoice Finished Good Item		9004	WG-1111				1	\$59.99	Micro Chrome Widget			\$59.99
17	Invoice Item Promotion			WG-1111				1	(\$59.99)				(\$59.99)
18	Invoice Item Promotion							1	(\$34.68)				(\$34.68)
19	Invoice Item Shipping and Handling							1	\$5.80				\$5.80

### Accounting Transactions

Is Posted	GI Fiscal Type Id	Acctg Trans Type Id	Transaction Date	Invoice Id	Return Id	Acctg Trans Id	Acctg Trans Entry Seq Id	GI Account Id	Debit Credit Flag	Amount	Organization Party Id	GI Account Class Id	Party Id	Reconcile Status Id	Acctg Trans Entry Type Id



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Here you see the detailed information available on this Invoice. As always, the colored items in a table are links to further information.

### .3.4.5 Send an invoice by email

id:[14280] image:



Welcome THE ADMINISTRATOR!  
2006-02-24 11:11:15.968

English (United States)

[Accounting](#) [Catalog](#) [Content](#) [Example](#) [Facility](#) [Manufacturing](#) [Marketing](#) [Order](#) [Party](#) [Shark](#) [WebTools](#) [WorkEffort](#)

#### Accounting Manager Application

[Main](#) [Agreements](#) [Billing Accounts](#) [Invoices](#) [Payments](#) [Chart of Accounts](#) [Fixed Assets](#) [Tax Authorities](#) [Transactions](#) [Logout](#)

[Overview](#) [Applications](#) [Send per Email](#)

[Create New](#) [Copy](#) [PDF](#) [Status to 'Send'](#)

For: [ID:10060]  
Send invoice per email

from Email Address

to Email Address

Cc Email Address

Subject

Body Text



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You can send an invoice as an email attachment from this screen.

### .3.4.6 Payments made are found here



Accounting Manager Application

**Find Payments** [Lookup Payment\(s\)](#) [New Payment](#)

PaymentID:

Payment Method Type:

Status:

From Party:

To Party:

Date Filter:  From  Thru

Payment(s) Found								Previous	1 - 5 of 5	Next
Payment #	Type	Method	Status	From Party	To Party	Effective	Amount			
<a href="#">10050</a>	Customer Payment	Credit Card	Received	10011	Company	2006-02-24 07:51:05.265	410.2			<a href="#">Edit</a>
<a href="#">10040</a>	Customer Payment	Credit Card	Received	10011	Company	2006-02-21 09:23:23.468	147.65			<a href="#">Edit</a>
<a href="#">10030</a>	Customer Payment	Credit Card	Received	10011	Company	2006-02-20 08:07:41.250	969.16			<a href="#">Edit</a>
<a href="#">10020</a>	Customer Payment	Credit Card	Received	10011	Company	2006-01-27 07:00:44.375	117.37			<a href="#">Edit</a>
<a href="#">10000</a>	Customer Payment	Credit Card	Received	10011	Company	2005-12-01 08:11:29.157	248.22			<a href="#">Edit</a>



Lookup payments at this screen. Results of the search are displayed in the table.

### .3.4.7 Create or View a Payment

As you can see in the following screen, the Payment screen contains a lot of information not normally at your fingertips. The screen for creating a Payment looks very similar to the View Payment screen: you have drop-down boxes for Payment Type, Payment Method Type, and Status. The other fields are asking for ID numbers which may be more difficult to obtain. <P> For the above reasons, it is probably quicker and easier to click on the [Receive Payment] link from the View Order screen than to try to create a Payment from the Accounting Manager.

### .3.4.8 View a Payment



Accounting Manager Application

Edit Payment

[\[Create Payment\]](#)

PaymentID: 10030

Payment Type:

Payment Method Type:

Status:

Payment Preference Id:

Payment Method Id:

To Party Id:

From Party ID:

Reference Number:

Amount:

Effective Date:

Comments:

Payment Application Id	Payment Id	Invoice Id	Invoice Item Seq Id	Billing Account Id	To Payment Id	Tax Auth Geo Id	Amount Applied
10020	10030	10080					969.16

Invoice Id

Invoice Item Seq Id

Billing Account Id

Tax Auth Geo Id

Amount Applied



Note that when viewing a Payment, there is no reference to the original Order. This is appropriate because an invoice might include monies due for several different Orders. Consult the Invoice or the Payment Application IDs to obtain more information.

## .3.5 Returns

### .3.5.1 The Return Process Overview

When a product is returned, the process impacts many different components of your business. Consider: <br> -1.) Customer must coordinate the physical return of the item(s) with your company. This is controlled by the document called the 'Return.' Be sure the Customer encloses a copy of the Return with his package or at least includes the Return ID on the shipping label and documents. <br> -2.) Your Facility needs to be alerted that the item(s) will be coming in from a source other than a regular supplier. <br> -3.) The value of the returned item(s) must be credited back to the Customer. <br> -4.) Taxes credited to taxing authorities must be reversed. <br> -5.) Costs for shipping, handling, perhaps re-shelving, must all be accounted for. <br> -6.) Possible replacement of the item must go through

the entire Order Fulfillment chain. <br> -7.) The returned item(s) must be inspected with a determination made whether to: <br> ---- a.) place an item back into Inventory for re-sale; OR <br> ---- b.) repair/ re-furbish/ re-packag before return to Inventory; OR <br> ---- c.) return a defective product to YOUR supplier for credit or refund; OR <br> ---- d.) dispose of it with a loss write-off. <br> -8.) Adjustments must be made to Inventory, Sales Figures, perhaps to Sales Commissions, and other records within the company. <P> As you scroll through the following screens, try to envision how each of these areas are impacted within the Company. Realize that the Order Manager, Work Effort Manager, Accounting Manager, and Facility Manager are primary players. The Marketing Manager and perhaps the Manufacturing Manager might be involved if some adjustments are needed. <P> Fortunately, the systems set up within Open For Business have automated much of this for you. However, by understanding the entire process, you can better stay alert for steps that might be needed as returns come back to your company.

### .3.5.2 Return processing begins in the Order Manager

id:[12304] image:

Order #WS10070 Information [ PDF ]	
<b>Status History</b>	Current Status: Completed
	Completed - 2006-02-20 08:07:31.984
	Approved - 2006-02-13 10:07:01.218
	Created - 2006-02-13 10:06:50.953
<b>Date Ordered</b>	2006-02-13 10:06:50.953

Before a Return can begin, the Order must be Complete.

### .3.5.3 Select the Return link

id:[12305] image:

Shipment Information - 00001	
<b>Address</b>	1313 Ave. Z
<b>Method</b>	DHL Express
<b>Splitting Preference</b>	Please ship items I ordered as they become available (you may incur additional shipping charges).
<b>Gift?</b>	This order is not a gift
<b>Shipments</b>	# <input type="text" value="10070"/> <a href="#">Packing Slip</a>
	<input type="button" value="Quick-Refund Entire Order"/> <input type="button" value="Create Return"/>

If entire order is to be returned, click on the [Quick-Refund Entire Order] link; otherwise (for one or more individual items), click on [Create Return].

### .3.5.4 Create New Return

id:[12307] image:



Welcome THE ADMINISTRATOR!  
2006-02-20 08:47:30.562

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing **Order** Party Shark WebTools Work Effort

#### Order Manager Application

Requests Quotes Order List Find Orders Order Entry Returns Requirements Order Tasks Stats Reports Logout

#### Create new return

Currency	<input type="text" value="American Dollar"/>
Entry Date	<input type="text"/> <input type="button" value="Calendar"/>
Return From Party	<input type="text"/>
Return To Facility	<input type="text" value="No Facility"/>
Billing Account	<input type="text"/>
Needs Auto-Receive (On ACCEPT)	<input type="text" value="N"/>
<input type="button" value="Create New"/>	



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Powered By [OFBiz](http://OFBiz)

You may also begin at the Returns tab, select the [Create new return] link, and begin from this screen.

### .3.5.5 New Return Created



Order Manager Application

The Following Occurred:

- Return Request #10011 was created successfully.

**Return Header** | Return Items

Return ID	<b>10011</b>
Currency	USD
Entry Date	2006-02-20 09:16:26.281 <input type="button" value="Calendar"/>
Return From Party	10011
Return To Facility	Web Store Warehouse <input type="button" value="v"/>
Billing Account	No Account <input type="button" value="v"/>
Needs Auto-Receive (On ACCEPT)	N <input type="button" value="v"/>
Return Status	Requested <input type="button" value="v"/>
Created By	admin
Return From Address	<input checked="" type="radio"/> <b>To:</b> Sherry Shopper 1313 Ave. Z Scottsbluff NE 69361 USA <input type="radio"/> <b>To:</b> Mr. Sherwood Shopper 1525 Ave. J Scottsbluff NE 69361 USA <input type="radio"/> No Address
Return To Address	<b>To:</b> Company XYZ <b>Attn:</b> ZJAA 2003 Open Blvd Orem UT 84058 USA <input type="button" value="Update"/>



The new Return Request is numbered and acknowledged at this screen. Select address and click [Update] to proceed.

### .3.5.6 Identify Order to load items



Welcome THE ADMINISTRATOR!  
2006-02-20 09:19:34.031

English (United States)

Accounting | Catalog | Content | Example | Facility | Manufacturing | Marketing | **Order** | Party | Shark | WebTools | Work Effort

**Order Manager Application**

Requests | Quotes | Order List | Find Orders | Order Entry | Returns | Requirements | Order Tasks | Stats | Reports | Logout

Items Returned In Return #10011

Order Items	Product Id	Description	Quantity	Price	Sub Total	Reason	Item Status	Type	Response
-------------	------------	-------------	----------	-------	-----------	--------	-------------	------	----------

No item(s) in return.

Return Item(s)

Order ID:  (Load order items for return)



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FIRST, identify which Order ID you wish to return items from. There are two paths here, depending upon which link you select. [Load Order Items] brings up the following worksheet to allow selection of some items to return. [Accept Return] means the ENTIRE ORDER will be returned.

### .3.5.7 Return Items Worksheet

## Order Manager Application

Requests Quotes Order List Find Orders Order Entry Returns Requirements Order Tasks Stats Reports Logout

Return Header Return Items

PDF

Return Item(s) From Order #

Select All

Description	Order Qty	Return Qty	Unit Price	Return Price*	Return Reason	Return Type	Item Status	Include?
GZ-5005: Purple Gizmo	1	<input type="text" value="0"/>	\$47.99	<input type="text" value="48.47"/>	<input type="text" value="Did Not Want Item"/>	<input type="text" value="Store Credit"/>	<input type="text" value="Delivered"/>	<input type="checkbox"/>
GZ-9290: His/Her Gizmo	1	<input type="text" value="0"/>	\$97.99	<input type="text" value="98.97"/>	<input type="text" value="Did Not Want Item"/>	<input type="text" value="Store Credit"/>	<input type="text" value="On Order"/>	<input type="checkbox"/>
GZ-1006-2: Open Gizmo (GPL)	1	<input type="text" value="0"/>	\$1.99	<input type="text" value="0.00"/>	<input type="text" value="Did Not Want Item"/>	<input type="text" value="Store Credit"/>	<input type="text" value="Delivered"/>	<input type="checkbox"/>
WG-1111: Micro Chrome Widget	1	<input type="text" value="1"/>	\$59.99	<input type="text" value="60.59"/>	<input type="text" value="Did Not Want Item"/>	<input type="text" value="Refund"/>	<input type="text" value="Returned"/>	<input checked="" type="checkbox"/>
WG-1111: Micro Chrome Widget	1	<input type="text" value="0"/>	\$59.99	<input type="text" value="0.00"/>	<input type="text" value="Did Not Want Item"/>	<input type="text" value="Store Credit"/>	<input type="text" value="Delivered"/>	<input type="checkbox"/>

Return Order Adjustment(s) From Order #

Description	Order Qty	Return Qty	Unit Price	Return Price*	Return Reason	Return Type	Item Status	Include?
Promotion	-	-	(\$20.60)	<input type="text" value="-20.60"/>	-	<input type="text" value="Store Credit"/>	-	<input type="checkbox"/>
Shipping and Handling	-	-	\$5.80	<input type="text" value="5.80"/>	-	<input type="text" value="Store Credit"/>	-	<input type="checkbox"/>

Manual Return Adjustment For Order #

<input type="text" value=""/>	-	-	\$0.00	<input type="text" value="0.00"/>	-	<input type="text" value="Store Credit"/>	-	<input type="checkbox"/>
-------------------------------	---	---	--------	-----------------------------------	---	---	---	--------------------------

\*Price includes tax & adjustments



Indicate which Items, how many, the reason, the type, and adjust the Return Price (if needed) from this screen.

### .3.5.8 Return is now created



Welcome THE ADMINISTRATOR!  
2006-02-20 10:04:31.25

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing **Order** Party Shark WebTools Work Effort

**Order Manager Application**

Requests Quotes Order List Find Orders Order Entry Returns Requirements Order Tasks Stats Reports Logout

**Return Header** Return Items

PDF

Items Returned In Return #10011

Order Items	Product Id	Description	Quantity	Price	Sub Total	Reason	Item Status	Type	Response
WS10090-00003	WG-1111	Micro Chrome V	1	60.59	\$60.59	Did Not Want Item	Returned	Refund	N/A

Return Total \$60.59

Return Item(s)

Order ID:  (Load order items for return)



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After the worksheet is submitted, this screen returns for you to confirm the items. Click on [Accept Return] to proceed, or select another Order ID to load other Order Items.

### .3.5.9 Confirmation of Return Items



Order Manager Application

The Following Occurred:

- The action was performed successfully.

[Return Header](#) [Return Items](#) [Receive Return](#)

[PDF](#)

Return ID	10011
Currency	USD
Entry Date	2006-02-20 09:16:26.281 <input type="button" value="Calendar"/>
Return From Party	<input type="text" value="10011"/>
Return To Facility	<input type="text" value="Web Store Warehouse"/>
Billing Account	<input type="text" value="No Account"/>
Needs Auto-Receive (On ACCEPT)	<input type="text" value="N"/>
Return Status	<input type="text" value="Accepted"/>
Created By	admin
Return From Address	<b>To:</b> Sherry Shopper 1313 Ave. Z Scottsbluff NE 69361 USA
Return To Address	<b>To:</b> Company XYZ <b>Attn:</b> ZJAA 2003 Open Blvd Orem UT 84058 USA
	<input type="button" value="Update"/>



Notice how the Return Status shows "Accepted," and there is now a link to [Receive Return]. To bypass the Warehouse-receiving documentation process, click Y for the "Needs Auto-Receive (On ACCEPT)" to expedite the process.

### .3.5.10 Notice change in the Order

id:[12311] image:

WG-1111 - Micro_Chrome Widget <a href="#">Catalog</a> <a href="#">Ecommerce</a>	Current: Completed 2006-02-17 12:35:18.796 : Completed 2006-02-17 09:19:55.312 : Approved 2006-02-17 09:19:49.75 : Created <b>Returned #</b> <a href="#">10011</a>	Ordered: 1 \$59.99 / \$60.00 Cancelled: 0 Remaining: 1	\$0.00	\$59.99
<b>Adjustment: Sales Tax:</b> (1% OFB_NA_Tax) <b>Jurisdiction:</b> Not Applicable [_NA_] <b>Rate:</b> 1			\$0.60	
<b>Ship Group:</b> [00001] 1313 Ave. Z		1		
<b>Issued to Shipment Item:</b> <a href="#">10060</a> :00002		1		

If you look at the Order now, you will see that the Item status has been changed to "Returned." This does not mean "Accepted" so do not change the Return status to Accepted until the item has been physically received back at your facility.

### .3.5.11 Record information on the Order Notes

id:[12313] image:

Notes		Create New
<b>By:</b> ADMINISTRATOR, THE <b>At:</b> 2006-02-20 10:31:10.531	Because she only wanted one Micro Chrome Gizmo and another one was sent as a Promo, she is returning the extra for a refund. Suggest in future that whenever a Promo freebie is also included as an order item, the customer be told before the duplicate item is shipped. This will prevent the expense of Returns when customers do not want more than one.	Internal Note (Not Printed)

Action items needing attention can be recorded here, but they should also be documented through Work Effort, Communication Events, Tasks, or Requests to ensure follow-through by those affected.

### .3.5.12 Facility Returns

#### .3.5.12.1 Begin the Facilities Shipment process

id:[12312] image:

The screenshot shows the 'Open For Business' web application. At the top left is the logo 'OPEN FOR BUSINESS OFBiz.org'. At the top right, it says 'Welcome THE ADMINISTRATOR!' with the date '2006-02-20 11:00:49.375' and a language dropdown set to 'English (United States)' with a 'Set' button. Below this is a navigation bar with tabs: Accounting, Catalog, Content, Example, Facility, Manufacturing, Marketing, Order, Party, Shark, WebTools, and WorkEffort. The 'Facility' tab is active, leading to the 'Facility Manager Application'. Inside this application, there are sub-tabs: Main, Facilities, Facility Groups, Shipments, Reports, and Logout. The 'Shipments' sub-tab is active, showing a 'Find Shipment(s)' form. The form has the following fields: 'Shipment Id' (text input), 'Shipment Type' (dropdown menu with 'Any Shipment Type' selected), 'Origin Facility' (dropdown menu with 'Any Facility' selected), 'Destination Facility' (dropdown menu with 'Any Facility' selected), 'Status' (dropdown menu with 'Sales Shipment Status' selected), and 'Date Filter' (two date pickers labeled 'From' and 'Thru'). To the right of the form are links for 'New Shipment' and 'Lookup Shipment(s)'. At the bottom of the page, there are logos for W3C CSS and W3C XHTML 1.0, and a copyright notice: 'Copyright (c) 2001-2006 The Open For Business Project - www.ofbiz.org Powered By OFBiz'.



Under the Facility manager, click the Shipments tab, then from this screen shown here, click on [New Shipment].

#### .3.5.12.2 Create an Incoming Sales Return Shipment

**Facility Manager Application**

Main Facilities Facility Groups Shipments

Reports Logout

Shipment type Id	<input type="text" value="Sales Return"/>
Status Id	<input type="text" value="Input"/>
Primary Order ID	<input type="text" value="WS10090"/>
Primary Ship Group Seq Id	<input type="text" value="0003"/>
Estimated Ready Date	<input type="text"/>
Estimated Ship Date	<input type="text"/>
Estimated Ship Work Eff Id	
Estimated Arrival Date	<input type="text"/> 
Estimated Arrival Work Eff Id	
Latest Cancel Date	<input type="text"/> 
Estimated Ship Cost	<input type="text"/>
Currency Uom Id	<input type="text"/>
Handling Instructions	<input type="text"/>
Origin Facility	<input type="text"/>
Destination Facility	<input type="text"/>
Origin Postal Address Id	<input type="text"/> -[To: , Attn: , , , , , ]-
Origin Phone Number Id	<input type="text"/> -[ ]-
Destination Postal Address Id	<input type="text"/> -[To: , Attn: , , , , , ]-
Destination Phone Number Id	<input type="text"/> -[ ]-
To Party	<input type="text"/> -[ ]-
From Party	<input type="text"/> -[ ]-
	<input type="button" value="Update"/>



Create a new shipment identifying it as a Sales Return. Enter the Primary Order ID and the Primary Ship Group Seq ID, then click the [Update] button. Many of the fields will then be automatically populated from the Order.

### .3.5.12.3 Create a Return Shipment



Facility Manager Application

The Following Occurred:

- The action was performed successfully.

Generate Shipment Manifest Report

Shipment Id  -[This cannot be changed without re-creating the Shipment]-

Shipment type Id

Status Id

Primary Order ID

Primary Ship Group Seq Id

Estimated Ready Date

Estimated Ship Date

Estimated Ship Work Eff Id

Estimated Arrival Date

Estimated Arrival Work Eff Id

Latest Cancel Date

Estimated Ship Cost

Currency Uom Id

Handling Instructions

Origin Facility [WS10090]

Destination Facility

Origin Postal Address Id  -[To: Company XYZ, Attn: ZJAA, 2003 Open Blvd, , Orem, UT, 84058, USA]-

Origin Phone Number Id  -[ 801 555-5555]-

Destination Postal Address Id  -[To: Sherry Shopper, Attn: , 1313 Ave. Z, , Scottsbluff, NE, 69361, USA]-

Destination Phone Number Id

To Party  -[Sherry Shopper ]-

From Party

Created Date 2006-02-20 11:02:11.734

Created By User Login admin

Last Modified Date 2006-02-20 11:02:13.234

Last Modified By User Login admin



You cannot receive a shipment unless a Shipment is expected, so create a Sales Return incoming shipment for the Return.



### .3.5.12.4 Return Items Created

id:[12319] image:



Welcome THE ADMINISTRATOR!  
2006-02-20 11:32:14.812

English (United States)

Accounting Catalog Content Example **Facility** Manufacturing Marketing Order Party Shark WebTools WorkEffort

#### Facility Manager Application

Main Facilities Facility Groups Shipments Reports Logout

View Edit Order Items **Items** Packages Route Segments

Item		Quantity		
00001	Micro Chrome Widget [ <b>WG-1111</b> ]	1	Returned by customer <input type="button" value="Delete"/>	
	Add to Package : <input type="text" value="New"/>	<input type="text" value="1"/> <input type="button" value="Add"/>		
New Item :	Product ID : <input type="text"/>	<input type="text" value="0"/>	Description : <input type="text"/>	<input type="button" value="Create"/>



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"Create" the items that will be returned. "Description" should be useful, not just product name.

### .3.5.12.5 Return Shipment ready to be received



Facility Manager Application

[View](#) | [Edit](#) | [Order Items](#) | [Items](#) | [Packages](#) | [Route Segments](#)

[Generate Shipment Manifest Report](#)

**Shipment Id** 10071  
**Shipment Type** Sales Return  
**Status** Input  
**Primary Order ID** [WS10090](#)  
**Primary Ship Group Seq ID** 0003  
**Estimated Dates** Ready: Ship: Arrival:  
**Latest Cancel Date**  
**Estimated Ship Cost** 5.8  
**Handling Instructions**  
**Facilities** **Origin:** Web Store Warehouse [WebStoreWarehouse]  
**Destination:** []  
**Parties** **To:** Sherry Shopper [10011] **From:** []  
**Addresses** **Origin:** 9200 [To : Company XYZ, Attn : ZJAA, 2003 Open Blvd, , Orem, UT, 84058, USA]  
**Destination:** 10002 [To : Sherry Shopper, Attn : , 1313 Ave. Z, , Scottsbluff, NE, 69361, USA]  
**Phone Numbers** **Origin:** 9201  
**Destination:**  
**Created** By [admin] On 2006-02-20 11:02:11.734  
**Last Updated** By [admin] On 2006-02-20 11:29:05.078

Item		Quantity	
00001	Micro Chrome Widget [ <a href="#">WG-1111</a> ]	1	Returned by customer

Segment	Carrier Shipment Method Origin-Destination Facility Origin-Destination Address ID Origin-Destination Phone ID	Carrier Status Tracking Number Estimated (Start-Arrive) Actual (Start-Arrive)	Billing Weight & UOM Currency UOM Actual Transport Actual Services Actual Other Actual Total
00001	[] Origin : Web Store Warehouse [WebStoreWarehouse] Dest : [] Origin : Dest: <b>10002</b> [To : Sherry Shopper, Attn : , 1313 Ave. Z, , Scottsbluff, NE, 69361, USA] Origin : Dest :	[- ] [- ]	[]



Preliminary details of the incoming Sales Return shipment are now available.

### .3.5.12.6 Identify the Return to Receive



Welcome THE ADMINISTRATOR!  
2006-02-24 08:30:57.671

English (United States)

Accounting Catalog Content Example **Facility** Manufacturing Marketing Order Party Shark WebTools WorkEffort

**Facility Manager Application**  
Main Facilities Facility Groups Shipments Reports Logout

Facility ContactMechs Groups Locations Roles Inventory Items Inventory Receive Inventory Xfers **Receive Return** Picking Packing  
Scheduling Incoming Shipments Outgoing Shipments

Receive Return Into "Web Store Warehouse" [ID:WebStoreWarehouse]  
[\[New Facility\]](#)

**Receive Return**

Return Number



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Enter the Return Number to start the Receive process at the Facility.

### .3.5.13 Confirm the Return Items

id:[12322] image:



Welcome THE ADMINISTRATOR!  
2006-02-24 08:10:19.078

English (United States)

Accounting Catalog Content Example Facility Manufacturing Marketing **Order** Party Shark WebTools Work Effort

**Order Manager Application**  
Requests Quotes Order List Find Orders Order Entry Returns Requirements Order Tasks Stats Reports Logout

Return Header **Return Items** Receive Return

Items Returned In Return #10011

Order Items	Product Id	Description	Quantity	Price	Sub Total	Reason	Item Status	Type	Response
<a href="#">WS10090</a> - 00003	<a href="#">WG-1111</a>	Micro Chrome Widget	1	\$60.59	\$60.59	Did Not Want Item	Returned	Refund	N/A



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Confirm the return items against the received Shipment and original Order.

### .3.5.14 Receive Return takes you back to Facilities

id:[12323] image:



Welcome THE ADMINISTRATOR!  
2006-02-24 08:15:43.687

English (United States)

Accounting | Catalog | Content | Example | **Facility** | Manufacturing | Marketing | Order | Party | Shark | WebTools | WorkEffort

Facility Manager Application

Main | Facilities | Facility Groups | Shipments | Reports | Logout

Facility | ContactMechs | Groups | Locations | Roles | Inventory Items | Inventory Receive | Inventory Xfers | **Receive Return** | Picking  
Packing | Scheduling | Incoming Shipments | Outgoing Shipments

Receive Return Into "Web Store Warehouse" [ID:WebStoreWarehouse]  
[\[New Facility\]](#)

Receive Return #10011

Select all

00001: [WG-1111 - Micro Chrome Widget](#) : Micro Widget - Chrome Colored

Location:  Qty Received:

Initial Inventory Item status:

Per Unit Price:



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Now all parts of the process are in place; when correct, click [Receive Selected Products].

### .3.5.15 Problems generate errors



Facility Manager Application

The Following Errors Occurred:

- Service invocation error on row (0): org.ofbiz.service.ServiceValidationException: The following required parameter is missing: orderTerms

Receive Return Into "Web Store Warehouse" [ID:WebStoreWarehouse]  
[New Facility]

Receive Return #10001 Select all

00001: GZ-8544 - Big Gizmo : Big Gizmo w/ Legs Location:  Qty Received:    
Initial Inventory Item Status:



When a parameter is missing or erroneous, an error message will appear.