IBM WebSphere Commerce

IBM

Business Relationship Management: Online Help Files

Version 54

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Contents

Chapter 1. Business Relationship Management

Business Relationship Management roles

The following business relationship management roles are supported by WebSphere Commerce:

- Sales Manager (page 1)
- Account Representative (page 1)
- Customer Service Representative (page 2)
- Customer Service Supervisor (page 3)

> B2B

Sales Manager

Sales Managers acquire and retain customers, meet sales forecasts, provide incentives for increased customer business, contract management, set pricing terms, work with product manager to establish inventory forecasts, and work with the Marketing Manager for promotions.

- Performs all marketing manager tasks
- Performs all account representative tasks
- Performs all customer service supervisor tasks
- Lists accounts
- Creates new accounts
- Deletes accounts
- Lists approvals
- Approves contracts
- Lists return reasons
- Creates new return reasons
- Views and changes return reasons

> B2B

Account Representative

Account representatives work with individual accounts to build relationships, and manage customer service issues. They may be authorized to change contract pricing, negotiate contracts, profiles, and analyze profitability by account category.

- Performs all marketing manager tasks
- Lists accounts
- Displays summaries of accounts
- Views and changes account information
- Views account reports
- Lists orders for accounts
- Lists contracts for accounts
- Views and changes orders
- Creates new contracts

- Displays contract summaries
- Views and changes contract information in draft state
- Views contract reports
- Submits contracts for approval
- Deletes contracts
- List discounts
- Creates new discounts
- Views and changes selected discounts
- Deletes discounts
- Lists products
- Finds products
- Associates discounts with selected products
- List coupons
- Creates new coupons
- Views and changes coupons
- Deletes coupons

Customer Service Representative (CSR)

No matter how well an on-line business is designed to provide a customer with self-service features, there will be some types of customers or some occasions when even the most web-literate customer will require personal contact. Most on-line businesses provide an e-mail, fax or contact number for the customer to obtain direct service. It is the responsibility of the customer service representative to handle all inquiries from the customer.

Note:

▶ B2B

Some inquiries may be handled by the Account Representative.
- Resets customers passwords
- Changes customer information
- Finds orders
- Tracks order status for customers
- Places orders for customers
- Changes orders for customers
- Cancels orders for customers
- Adds comments to orders
- Displays summaries of orders
- Views invoices for orders
- Places guest orders
- Find customers
-

▶ B2C

Change customer information
- Creates new returns on behalf of   customers

-

  `▶ B2B`

  Displays the summaries of a selected customer
-

  `▶ B2B`

  Displays the account summaries for a selected customer
-

  `▶ B2B`

  Lists the contracts for which customers are eligible
-

  `▶ B2B`

  Displays the contract summaries
-

  `▶ B2B`

  Enables the accounts associated with customer IDs
- Creates returns
- Changes returns
- Cancels returns
- Reports return of goods for customers
- Lists receipts for returns
- Finds returns
- Displays summaries of returns
-

  `▶ B2B`

  Displays contracts for customers associated with a selected return
- Views payment exceptions and requests to proceed with payments
- Retracts auction bids
- Modifies auction messages
- Replies to auction forums
- Deletes auction messages

Customer Service Supervisor

This role has access to all customer service tasks. The Customer Service Supervisor manages customer inquiries (such as customer registration, orders, returns, and auctions) and has authority to complete tasks that cannot be accessed by a Customer Service Representative (page 2), such as approving system-denied returns records, and contacting customers regarding payment exceptions (such as credit card authorization failures).

- Performs all CSR tasks
- Oversees regular CSR activities
- Processes payments
- Approves returns rejected by automatic processing

- Approves payments (Payments only need to be approved if the payment system finds it is risky to approve automatically. Most payments are approved automatically)
- Deposits payments
- Settles payments
- Finds payments
- Finds payment batches

Business Relationship Management tools (Business Edition)

The Business Relationship Management tools in the WebSphere Commerce Accelerator allows you to manage the relationships between buyers and sellers using various notebooks.

Using the WebSphere Commerce Accelerator, you can work with:

- **Business accounts.** Business accounts represent the relationship between a store and the store's customer organizations and are the starting point for managing business relationships. The Account notebook lets you create new business accounts, change existing business accounts, and view orders and manage contracts that are under a business account. From the Account List page, you can access reports such as orders by account, refund by account, sales by account, and order summaries for an account.

- **Contracts.**Contracts enable a customer organization to purchase products from a store or a group of stores at a specified price for a specified period of time. The Contracts notebook lets you create new contracts for a business account, change existing contracts, submit contracts for approvals, suspend and resume contracts, and cancel contracts. You can also duplicate contracts and create new versions of contracts. From the Contract List page, you can access reports such as orders by contract, refunds by contract, sales by contract, and order summaries for a contract.

Chapter 2. Sales Manager

Managing business accounts

Creating a new business account (Business Edition)

To create a new business account in WebSphere Commerce, choose one of the following methods:

- Creating a new business account using WebSphere Commerce Accelerator
  You can use the Business Relationship Management tools in WebSphere Commerce Accelerator to create a business account.

- Creating a new business account using XML
  Creating business accounts using XML allows you to create business accounts that use display customization. To successfully create a business account using XML, you should be familiar with XML and structure of the DTD file that defines the structure of business account XML files.

Managing contracts

Approving or rejecting a draft contract (Business Edition)

Draft contracts can be approved or rejected by approvers and administrators with appropriate access. The process for approving or rejecting a contract is the same process used for all approvals in WebSphere Commerce.

To approve or reject a contract, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Select **Store > Approval Requests**. The Approval Requests page displays.
3. Select the check box to the left of the contract that you want to approve or reject. If you want to see a summary of the contract details, click **Summary**.
4. Click **Approve** to approve the contract or **Reject** to reject it. The status for the contract you are working on will update to reflect your decision.

Approvals (Business Edition)

Accurate, secure transactions require that a second individual approve some electronic marketplace actions before they proceed. This individual, called an approver, can accept or reject requests to perform a specific action. During the organization registration process, the organization administrator selects the business processes for which they want to enable approval. This is done by signing up for the appropriate approval member group during membership registration. The organization administrator also populates the approver member groups. Only users within these groups have the authority to accept or reject requests to perform those actions for which approval has been enabled.

When an organization signs up for a specific approver member group, users having a specific user role are implicitly placed in that group. Any user with the default role for that organization becomes an approver for the corresponding action. The four approver member groups and their associated default roles available out-of-the-package are:

Process subject to approval	Default role
Order process	Buyer approver
User registration	Buyer administrator
Contract submit	Sales manager
RFQ response	Sales manager

For example, when an organization signs up for RFQ response approvals, an RFQ response approval member group is created for the organization. All of the organization's users who have been given a "Sales Manager" role will be implicitly placed into this group. The organization administrator can add or modify the rules determining which user roles are implicitly placed within a particular approval member group. They can also explicitly place users within a particular approval member group.

Note: If an organization administrator does not sign up for an approver member group, approval will not be enabled for the associated business process. This means that all instances of that particular process are automatically approved.

User interaction withapprovals

1. The system determines whether approval is required for the organization performing the particular action.
2. An approver is selected from the appropriate approver member group.
3. If approval is not required, pre and post-processing tasks are initiated.
4. If approval is required, the pre-approve command is invoked and the approval request is stored. E-mail notifications are sent to approvers.
5. An approver checks the list of approval requests awaiting approval and approves or rejects them. If desired, the approver can add comments.
6. If approved, the post-approve command, if any, is invoked. If rejected, the post-reject command, if any, is invoked.
7. The submitter can check the approval status throughout the process and view the approver's comments..

Note: When an approvable action enters the approval process, the submitter sees it as an "approval submission" or "submission" in the user interface. The approver responsible for approving the action sees it referred to as an "approval request" or "request" in the user interface.

The entire process is carried out with an HTML browser. Approvers receive notifications of all approval requests in their Mailboxes.

Searching for approval requests (Business Edition)

To search for a specific request or group of requests, do the following.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Click **Store > Find Approval Requests**. The Approval Requests page displays.
3. Check **Find.** The Find Approval Requests form displays.
4. Specify the criteria appropriate to your search.
   - Request Number
     If you are searching for a specific request, type its ID number, if known.
   - Process
     If you want to retrieve all requests for a specific process, select it here.

- Submitter
  To retrieve all requests received from a specific submitter, select the submitter.
- Approvers (Displays to Site Administrators only)
  To retrieve all requests being reviewed by a specific approver, select the approver here.
- Status
  To retrieve all requests currently in a specific status, select the status.
- Date
  To retrieve all requests submitted either on a specific date, or within a specific period, indicate your criteria here.

5. Click **Find**. The Search Results - Approval Requests page displays.
   If only pending requests are retrieved, the page will be identical in appearance, to the Approval Requests page, except that the View field will be disabled. If the search retrieves requests in an approved or rejected status, the page will include two additional columns: Approved On or Rejected On and Remarks. In addition, neither the Approve or Reject buttons will be enabled.

Viewing approval requests (Business Edition)

Approvers and administrators with the appropriate access, can view approval requests and make approval decisions. To view approval requests, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Click **Store > Approval Requests**. The Approval Requests page displays. It contains the following information for each request:
   - ID
     This is a unique identification code for the request.
   - Submitter
     The logonid or other unique identifier for the user who initiated the approval request.
   - Process
     The name of the business process for which approval has been requested.
   - Status
     This column indicates whether an approval request is pending, has been approved or has been rejected.
   - Submitted on
     The date and time of submission.

Viewing approval request details (Business Edition)

Approvers and administrators with the appropriate access, can view approval requests and make approval decisions. To view request details, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Click **Store > Approval Requests**. The Approval Requests page displays.
3. Select the check box for the row containing the request you are working on.
4. Click **Summary.** The Summary page displays. If the request is in a pending state, the **Approve** and **Reject** buttons as well as the **Print** and **OK** buttons are available. If displayed page represents an approval request in an approved or rejected state, only the **Print** and **OK** buttons are available.

Administrators can access this page on the Administration Console.

Approving or rejecting approval requests (Business Edition)

Approvers and administrators with the appropriate access, can make approval decisions on two different pages: Approval Requests or Summary. If you prefer to have the request details in front of you before indicating your decision, you may prefer to work from the Summary page.

To make a decision from the approval requests page

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Click **Store > Approval Requests**. The Approval Requests page displays.
3. Select the check box for the request you are working on.
4. Click **Approve** to approve the request or **Reject** to reject it. The requests that have been approved or rejected will no longer appear on the list. A message box indicates if the approval or rejection attempt was successful.

To Make a decision from the summary page

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Click **Store > Approval Requests**. The Approval Requests page displays.
3. Select the check box for the request you are working on.
4. Click **Summary**. The Summary page displays.
5. After reviewing the details, click **Approve** to approve the request or **Reject** to reject it.
   A message box indicates if the approval or rejection attempt was successful. The Approval Requests page displays, showing the updated status for the request you are working on.

Note: The check box on the column heading row acts as a toggle. It will either place a check in all boxes or remove checks from all the checked boxes.

Attaching remarks to approval decision (Business Edition)

To attach a remark to your approval or rejection decision, do the following.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Click **Store > Approval Requests**. The Approval Requests page displays.
3. Select the the check box for the request you want to work on.
4. Click either the **Approve** or **Reject** button. The Approval Remark or Rejection Remark form displays, depending on your selection.
5. Type your remark in the **Remarks** text box.
6. Click **OK**. The RFQ Request or Summary page displays, depending on which one you were working on.

Chapter 3. Account Representative

Managing business accounts

Changing a business account (Business Edition)

To change a business account, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.
3. Select the check box to the left of the business account that you want to change. Click **Change**. This will launch the Account notebook.
4. Update the fields for each page as required, and use the links on the left side to switch between pages. Help is available for each page if you require help using the fields.
5. Click **OK** to save the updated business account and close the notebook.

Viewing a business account summary (Business Edition)

To view a a summary of a business account, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.
3. Select the check box to the left of the business account that you want to view. Click **Summary**. The Account Summary page displays, containing information about the selected business account.
4. When you are finished, click **OK** to return to the previous page.

Viewing contracts for a business account (Business Edition)

To view contracts for a business account, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.
3. Select the check box to the left of the business account that you want to view the contracts for. Click **Contracts**. The Contract List page displays showing contracts under the account selected.

Viewing orders for a business account (Business Edition)

To view orders for a business account, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.
3. Select the check box to the left of the business account that you want to view the orders for. Click **Orders**. The Order List page displays showing orders under the account selected.

Viewing invoices for an order

To view invoices for a business account, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.
3. Select the check box to the left of the business account that you want to view the invoices for. Click **Invoices**. The Invoice List page displays showing invoices under the account selected.

Contracts (Business Edition)

Contracts enable a customer organization to purchase products from a store or a group of stores at a specified price for a specified period of time under specific conditions. WebSphere Commerce provides the ability to record and deploy contracts that have been negotiated.

A contract consists of the following elements:

Profile

The contract profile contains the identifying information for the contract. This information includes a unique name for the contract, a short description, and a time period for which the contract is valid.

Participants

Contract participants are the organizations that take part in the contract. There is a buyer organization, a seller organization and contacts at both organizations.

Terms and conditions

Contract terms and conditions are the rules that cover the actual implementation of the contract. Contract terms and conditions cover such information as product pricing, returns and refunds, payment, shipping, and order approval. For more information on contract terms and conditions, refer to the related topic below.

Attachments

Contract attachments cover any information not covered by the previous elements such as file attachments that provide additional information about the contract and any general remarks about the contract. WebSphere Commerce stores Universal Resource Identifiers (URIs) for contract attachments, not the actual attachments.

All contracts, except the store default contracts, are associated with business accounts. Contracts can not be created for customers you have not created an account for. For more information on default contract, see the related topic below.

Different items in a single order may be purchased under different contracts. Buyers can select the contract they shop under at either the start of the shopping flow or when they add an item to their order, depending on the store design. When purchasing items under different contracts the following rules apply:

- Contracts for all items in an order must share at least one payment method. If the contract for an item does not share a payment method, the buyer can not add that item to the order. Only the payment methods share by all items in an order can be used to pay for the order.
- All items in an order must come from contracts belonging to the same business account or the store default contract.

The various states a contract goes through from creation until it is deleted is called the contract lifecycle. For a description of the contract lifecycle, see the related topic below.

Contracts are managed using the WebSphere Commerce Accelerator.

Managing contracts

Creating a new contract using WebSphere Commerce Accelerator (Business Edition)

Creating a new contract using the WebSphere Commerce Accelerator creates a contract in the *draft* state. This contract will then go through any approval process defined for your store. If you want to create a new contract in either the *approved* or *active* state, you must import the contract from an XML file. For instructions on importing a contract, see the related topic below.

To create a new contract, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.
3. Select the check box to the left of the business account that you want to create a new contract for. Click **New Contract.** This will launch the Contract notebook.
4. Complete the fields for each page as required, and use the links on the left side to switch between pages. Help is available for each page if you require help using the fields.
5. Click **OK** to save the contract and close the notebook. The contract is displayed in the Contract List page.

Duplicating a contract (Business Edition)

Duplicating a contract creates a draft version of an existing contract. The new draft version of the contract has a different name, but all the other contract information is the same as the original. You can duplicate any contract.

If you want to create a new version of an existing contract with the same name, you should create a new version of the contract. For instructions on creating a new version of a contract, see the related topic below. You can only create a new version of an approved, active, or suspended contract. Deploying a new version of a contract, moves the original contract into the closed state.

To create a new contract by copying an existing contract, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.
3. Select the check box to the left of the business account that has the contract you want to duplicate. Click **Contracts.** The Contract List page displays, containing contracts currently defined for the selected business account.
4. Select the check box to the left of the contract that you want to duplicate. Click **Duplicate**. The Duplicate Contract dialog displays.

5. Enter a new name for the duplicate contract and click **OK**. The Contract List page displays.

6. Select the check box to the left of the new copy of the contract. Click **Change**. The Contract notebook opens.

7. Update the fields for each page as required, and use the links on the left side to switch between pages. Help is available for each page if you require help using the fields.

8. Click **OK** to save the updated contract and close the notebook.

Creating a new version of a contract (Business Edition)

Creating a new version of a contract creates a draft version of an existing contract. This new version has the same name as the original contract, but the version number is incremented. When you deploy a new version of a contract, the existing contract is moved to the closed state. You can create a new version of a contract for contracts that are in the approved, active, or suspended states.

If you want to create a new version of an existing contract with a different name, you should duplicate a contract. For instructions on duplicating a contract, see the related topic below. Duplicating a contract does not move the existing contract into the closed state.

To create a new version of a contract, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.

3. Select the check box to the left of the business account that has the contract you want to duplicate. Click **Contracts.** The Contract List page displays, containing contracts currently defined for the selected business account.

4. Select the check box to the left of the contract that you want to create a new version of. Click **New version**.

5. Select the check box to the left of the new draft version of the contract. Click **Change**. The Contract notebook opens.

6. Update the fields for each page as required, and use the links on the left side to switch between pages. Help is available for each page if you require help using the fields.

7. Click **OK** to save the updated contract and close the notebook.

Changing a contract (Business Edition)

To change a contract, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.

3. Select the check box to the left of the business account that has the contract you want to change. Click **Contracts.** The Contract List page displays, containing contracts currently defined for the selected business account.

4. Select the check box to the left of the contract that you want to change. Click **Change**. This will launch the Contract notebook.

5. Update the fields for each page as required, and use the links on the left side to switch between pages. Help is available for each page if you require help using the fields.

6. Click **OK** to save the updated contract and close the notebook.

Viewing a contract summary (Business Edition)

To view a a summary of a contract, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.

3. Select the check box to the left of the business account that has the contract you want to view. Click **Contracts.** The Contract List page displays, containing contracts currently defined for the selected business account.

4. Select the check box to the left of the contract that you want to view. Click **Summary**. The Contract Summary page displays, containing information about the selected contract.

5. When you are finished, click **OK** to return to the previous page.

Deleting a contract (Business Edition)

To delete a contract, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.

3. Select the check box to the left of the business account that has the contract you want to delete. Click **Contracts.** The Contract List page displays, containing contracts currently defined for the selected business account.

4. Select the check box to the left of the contract that you want to delete. Click **Delete**. The page should now display the updated list of contracts.

Submitting a contract for approval (Business Edition)

To submit a contract for approval, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.

3. Select the check box to the left of the business account that as the contract you want to submit for approval. Click **Contracts.** The Contract List page displays, containing contracts currently defined for the selected business account.

4. Select the check box to the left of the contract that you want to submit for approval. Click **Submit**. The page should now display the updated status of the contract.

Suspending an active contract (Business Edition)

To suspend a contract, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.

3. Select the check box to the left of the business account that has the contract you want to suspend. Click **Contracts.** The Contract List page displays, containing contracts currently defined for the selected business account.

4. Select the check box to the left of the contract that you want to suspend. Click **Suspend**. The page should now display the updated status of the contract.

Resuming a suspended contract (Business Edition)

To resume a contract, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.

3. Select the check box to the left of the business account that has the contract you want to resume. Click **Contracts.** The Contract List page displays, containing contracts currently defined for the selected business account.

4. Select the check box to the left of the contract that you want to resume. Click **Resume**. The page should now display the updated status of the contract.

Canceling a contract (Business Edition)

To cancel a contract, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. From the **Sales** menu, click **Accounts**. The Account List page displays, containing business accounts currently defined for the selected store.

3. Select the check box to the left of the business account that has the contract you want to cancel. Click **Contracts.** The Contract List page displays, containing contracts currently defined for the selected business account.

4. Select the check box to the left of the contract that you want to cancel. Click **Cancel**. The page should now display the updated status of the contract.

Reports

There are two sources of reports in WebSphere Commerce. All reports are available through the WebSphere Commerce Accelerator. These reports provide information on a wide variety of sources and can be broken down into the following categories:

Business reports

> Business

Account and contract management
> The reports provide information about orders with respect to accounts and contracts. These reports are generated in real time from your operational database.

Marketing
> These statistical reports include information collected on campaign events and on customer usage of the Product Advisor. For more information, see the Marketing Event Monitor online help.

Sales These reports contain sales information according to geography, time, and date.

Many of the above reports are generated by WebSphere Commerce Analyzer.

Operational reports

These reports provide information that supports your inventory management, order management, returns management, and fulfillment. These reports are generated in real time from your operational database.

These reports provide comprehensive information about your site. They include information which has been extracted to a datamart on a remote machine, and analyzed to produce very specific information. These reports are only available if you have installed and configured WebSphere Commerce Analyzer. Refer to the *WebSphere Commerce Analyzer Installation and Configuration Guide* for more information.

WebSphere Commerce Analyzer reports

WebSphere Commerce Analyzer is an optional application included with WebSphere Commerce. If installed, it provides a robust business intelligence solution designed to analyze and report on the activities of your customers.

The Commerce Analyzer reports, accessible from the WebSphere Commerce Accelerator, demonstrate comparable success rates of your marketing campaigns, as well as demographic distributions of your customers. These reports provide feedback that can be used to evaluate recent campaigns and to initiate change for upcoming campaigns. The reports are presented according to the context from which they are requested. For example, if you are looking at the list of defined campaigns when you click the **Reports** button, you will see a list of the reports that are relevant for campaigns. The available contexts include the following:

- store

-

  > Business

  accounts and contracts
- campaigns
- campaign initiatives
- e-Marketing spots

WebSphere Commerce Analyzer automatically extracts data from the production database, on a regular basis, where it then processes logs and numerous database records to compile reports based on customer traffic and site usage. The data extraction schedule is fully configurable. A typical schedule would be to run the data extraction process on a daily basis in order to minimize the amount of data that is extracted during each run. WebSphere Commerce Analyzer is typically located on a remote dedicated machine to reduce any performance effects on the production machine.

For more information about WebSphere Commerce Analyzer, refer to the *WebSphere Commerce Analyzer User's Guide*.

Account and contract management reports (Business Edition)

> Business

There are six reports available to help you efficiently manage your accounts and contracts.

The following reports are available:

- Orders by account report - Review orders for the selected account
- Balance-Limits of limited purchase orders by account report - Review the current balance, and the limit of purchase orders for the selected account
- Refund by account report - Review the refunds issued to the selected account
- Contracts close to expiry date report - Review the contracts for the selected account that are close to expiring
- Orders by contract report - Review orders for the selected contract
- Refund by contract report - Review the refunds issued to the selected contract

Chapter 4. Customer Service Representative

Customer information

Use the Customer Information notebook within the WebSphere Commerce Accelerator to maintain various information about customers, including the customer's address, contact information, and demographics.

If customers register with the store, you can also maintain their registration profiles to track information such as the customer's logon ID, logon password, authentication information, store account status, title, name, preferred language or currency. A Customer Service Representative or Operations Manager may use this information when customers contact the store about their orders or accounts.

Finding a customer

To find a customer, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

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   From the **Operations** menu, click **Find Customers**.

   > B2B

   From the **Sales** menu, click **Find Customers**.
   A search dialog opens.
3. Provide any of the following customer information. At least one field must be specified.
   - In the **Customer logon ID** field, type all or part of the customer's logon ID.
   - In the **First name** field, type all or part of the customer's first name.
   - In the **Last name** field, type all or part of the customer's last name.
   - In the **Phone number 1** field, type all or part of the customer's primary phone number.
   - In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
   - In the **City** field, type all or part of the city of the customer's contact address.
   - In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
   -

     > B2B

     In the **Account name** field, select the account name associated with this customer. By default, this value is blank and the account name will not be used as part of the search criteria. The account name is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of customers that match the search criteria displays.

Changing a customer's information (B2C)

To change the details of a customer's information, such a customer's name, address, contact information, or demographics, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Operations** menu, click **Find Customers**. A search dialog opens.
3. Search for the customer with which you want to work by providing at least one of the following customer information:
   - In the **Customer logon ID** field, type all or part of the customer's logon ID.
   - In the **First name** field, type all or part of the customer's first name.
   - In the **Last name** field, type all or part of the customer's last name.
   - In the **Phone number 1** field, type all or part of the customer's primary phone number.
   - In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
   - In the **City** field, type all or part of the city of the customer's contact address.
   - In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
   -

     ▶ B2B

     In the **Account name** field, select the account name associated with this customer. By default, this value is blank and the account name will not be used as part of the search criteria. The account name is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.
4. Click **Find**. The system performs a search and a list of customers that match the search criteria displays.
5. Open the Customer Information notebook by doing one of the following:
   - Select the check box next to the customer that you want to work with, and click **Change**.
   - From the **Customer Logon ID** column, click the customer logon ID.
6. Update the fields as required and use the links on the left side to switch between each customer information page. Help is available for each page.
7. Click **OK** to save the changes and close the notebook.

Changing a customer's registration profile (B2C)

To change a customer's registration profile, such as the customer's logon ID, logon password, authentication information, store account status, title, name, preferred language or currency, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Operations** menu, click **Find Customers**. A search dialog opens.
3. Search for the customer with which you want to work by providing at least one of the following customer information:

- In the **Customer logon ID** field, type all or part of the customer's logon ID.
- In the **First name** field, type all or part of the customer's first name.
- In the **Last name** field, type all or part of the customer's last name.
- In the **Phone number 1** field, type all or part of the customer's primary phone number.
- In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
- In the **City** field, type all or part of the city of the customer's contact address.
- In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
-

> B2B

In the **Account name** field, select the account name associated with this customer. By default, this value is blank and the account name will not be used as part of the search criteria. The account name is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a search and a list of customers that match the search criteria displays.
5. Open the Customer Information notebook by doing one of the following:
   - Select the check box next to the customer that you want to work with, and click **Change**.
   - From the **Customer Logon ID** column, click the customer logon ID.
6. When you open the notebook, the General page displays. Update each field on the page as required.
7. To make other changes to this customer's registration information, use the links on the left side to switch between each customer information page. To save the changed registration profile and close the notebook, click **OK**.

Changing the status of a customer's logon account

To change the status of a customer's logon account, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

> B2C

From the **Operations**menu, click **Find Customers**.

> B2B

From the **Sales** menu, click **Find Customers**.
A search dialog opens.

3. Search for the customer with which you want to work by providing at least one of the following customer information:
   - In the **Customer logon ID** field, type all or part of the customer's logon ID.
   - In the **First name** field, type all or part of the customer's first name.
   - In the **Last name** field, type all or part of the customer's last name.

- In the **Phone number 1** field, type all or part of the customer's primary phone number.
- In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
- In the **City** field, type all or part of the city of the customer's contact address.
- In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
-

  > B2B

  In the **Account name** field, select the account name associated with this customer. By default, this value is blank and the account name will not be used as part of the search criteria. The account name is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a search and a list of customers that match the search criteria displays.
5. Do one of the following:
   -

     > B2C

     a. Open the Customer Information notebook by selecting the check box next to the customer that you want to work with, and click **Change**. The General page displays.
     b. Under **Account status**, select the status of the customer's account with the store as follows:
        – Select **Enable** to specify that the account is enabled (for example, if a customer is locked out of the account, you can manually enable it by selecting this option).
        – Select **Disable** to specify that the customer's account in inactive (for example, if the customer has tried to log on several times with an invalid logon ID or password, the customer may be locked out of the account).

   -

     > B2B

     a. Select the check box next to the customer that you want to work with, and click **Customer Summary** to view the details of the customer.
     b. You can only enable the customer's account with the store (for example, if a customer is locked out of the account, you can manually enable it). To do this, from the customer summary, click **Enable Account** to enable the account. The **Account status** field displays **Enabled** to indicate that the account is active.

6. To make other changes to this customer's registration information, use the links on the left side to switch between each customer information page. To save the changed registration profile and close the notebook, click **OK**.

Changing a customer's password

If customers have forgotten the logon passwords assigned during registration, you can reset the old passwords to new ones.

Notes:
1. If no e-mail address is specified during registration, you cannot reset the password for the customer.
2. To reset a password, the system should be configured for messaging.

To change a customer's password, do the following:
1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > **B2C**

   From the **Operations**menu, click **Find Customers**.

   > **B2B**

   From the **Sales** menu, click **Find Customers**.
   A search dialog opens.
3. Search for the customer with which you want to work by providing at least one of the following customer information:
   - In the **Customer logon ID** field, type all or part of the customer's logon ID.
   - In the **First name** field, type all or part of the customer's first name.
   - In the **Last name** field, type all or part of the customer's last name.
   - In the **Phone number 1** field, type all or part of the customer's primary phone number.
   - In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
   - In the **City** field, type all or part of the city of the customer's contact address.
   - In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
   -

     > **B2B**

     In the **Account name** field, select the account name associated with this customer. By default, this value is blank and the account name will not be used as part of the search criteria. The account name is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.
4. Click **Find**. The system performs a search and a list of customers that match the search criteria displays.
5. From this list, select the check box next to the customer that you want to work with, and click **Reset Password**.
6. To authenticate that you are authorized to change passwords, you are prompted to provide your WebSphere Commerce Accelerator password. This is the same password you used to log onto the WebSphere Commerce Accelerator. The system generates a new password for the customer and e-mails it to the

customer's primary e-mail address. If no e-mail address is specified during registration, you cannot reset the password for the customer.

Changing a customer's address (B2C)

To change a customer's contact address, which was provided during registration, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Operations**menu, click **Find Customers**. A search dialog opens.
3. Search for the customer with which you want to work by providing at least one of the following customer information:
   - In the **Customer logon ID** field, type all or part of the customer's logon ID.
   - In the **First name** field, type all or part of the customer's first name.
   - In the **Last name** field, type all or part of the customer's last name.
   - In the **Phone number 1** field, type all or part of the customer's primary phone number.
   - In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
   - In the **City** field, type all or part of the city of the customer's contact address.
   - In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
   -

     > B2B

     In the **Account name** field, select the account name associated with this customer. By default, this value is blank and the account name will not be used as part of the search criteria. The account name is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.
4. Click **Find**. The system performs a search and a list of customers that match the search criteria displays.
5. Open the Customer Information notebook by doing one of the following:
   - Select the check box next to the customer that you want to work with, and click **Change**.
   - From the **Customer Logon ID** column, click the customer logon ID.
6. When you open the notebook, the General page displays. From the left navigation frame, click **Address**. The Address page displays.
7. Update each field on the page as required.
8. To make other changes to this customer's registration information, use the links on the left side to switch between each customer information page. To save the changed address and close the notebook, click **OK**.

Changing a customer's contact information (B2C)

To change a customer's contact information, which was provided during registration, such as a phone number, fax number, or e-mail address, do the following:

- Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

- From the **Operations**menu, click **Find Customers**. A search dialog opens.
- Search for the customer with which you want to work by providing at least one of the following customer information:
  - In the **Customer logon ID** field, type all or part of the customer's logon ID.
  - In the **First name** field, type all or part of the customer's first name.
  - In the **Last name** field, type all or part of the customer's last name.
  - In the **Phone number 1** field, type all or part of the customer's primary phone number.
  - In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
  - In the **City** field, type all or part of the city of the customer's contact address.
  - In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
  -

    ▶ B2B

    In the **Account name** field, select the account name associated with this customer. By default, this value is blank and the account name will not be used as part of the search criteria. The account name is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.
- Click **Find**. The system performs a search and a list of customers that match the search criteria displays.
- Open the Customer Information notebook by doing one of the following:
  - Select the check box next to the customer that you want to work with, and click **Change**.
  - From the **Customer Logon ID** column, click the customer logon ID.
- When you open the notebook, the General page displays. From the left navigation frame, click **Contact**. The Contact page displays.
- Update each field on the page as required.
- To make other changes to this customer's registration information, use the links on the left side to switch between each customer information page. To save the changed contact information and close the notebook, click **OK**.

Changing a customer's demographic information (B2C)

To change a customer's demographic information, which was provided during registration, do the following:
- Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
- From the **Operations**menu, click **Find Customers**. A search dialog opens.
- Search for the customer with which you want to work by providing at least one of the following customer information:
  - In the **Customer logon ID** field, type all or part of the customer's logon ID.
  - In the **First name** field, type all or part of the customer's first name.
  - In the **Last name** field, type all or part of the customer's last name.
  - In the **Phone number 1** field, type all or part of the customer's primary phone number.

- In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
- In the **City** field, type all or part of the city of the customer's contact address.
- In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
-

> ▶ B2B

   In the **Account name** field, select the account name associated with this customer. By default, this value is blank and the account name will not be used as part of the search criteria. The account name is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.
- Click **Find**. The system performs a search and a list of customers that match the search criteria displays.
- Open the Customer Information notebook by doing one of the following:
  - Select the check box next to the customer that you want to work with, and click **Change**.
  - From the **Customer Logon ID** column, click the customer logon ID.
- When you open the notebook, the General page displays. From the left navigation frame, click **Demographics**. The Demographics page displays.
- Update each field on the page as required.
- To make other changes to this customer's registration information, use the links on the left side to switch between each customer information page. To save the changed demographical nformation and close the notebook, click **OK**.

Viewing a customer summary (B2B)

To view a summary of information about a customer, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Sales** menu, click **Find Customers**. A search dialog opens.
3. Search for the customer with which you want to work by providing at least one of the following customer information:
   - In the **Customer logon ID** field, type all or part of the customer's logon ID.
   - In the **First name** field, type all or part of the customer's first name.
   - In the **Last name** field, type all or part of the customer's last name.
   - In the **Phone number 1** field, type all or part of the customer's primary phone number.
   - In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
   - In the **City** field, type all or part of the city of the customer's contact address.
   - In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
   -

     > ▶ B2B

     In the **Account name** field, select the account name associated with this customer. By default, this value is blank and the account name will not be

used as part of the search criteria. The account name is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a search and a list of customers that match the search criteria displays.

5. Select the check box next to the customer that you want to work with, and click **Customer Summary** to view the details of the customer.

6. Click **OK** to close the page.

Printing a customer summary (B2B)

To print a summary of information about a customer, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. From the **Sales** menu, click **Find Customers**. A search dialog opens.

3. Search for the customer with which you want to work by providing at least one of the following customer information:

   - In the **Customer logon ID** field, type all or part of the customer's logon ID.
   - In the **First name** field, type all or part of the customer's first name.
   - In the **Last name** field, type all or part of the customer's last name.
   - In the **Phone number 1** field, type all or part of the customer's primary phone number.
   - In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
   - In the **City** field, type all or part of the city of the customer's contact address.
   - In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
   -

     > B2B

     In the **Account name** field, select the account name associated with this customer. By default, this value is blank and the account name will not be used as part of the search criteria. The account name is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a search and a list of customers that match the search criteria displays.

5. Select the check box next to the customer that you want to work with, and click **Customer Summary**. A summary of the customer displays.

6. Click **Print** to print a customer summary.

7. Click **OK** to close the page.

Orders

A typical order includes one or more products, billing and shipping addresses, payment details, and the total cost (including shipping charges and taxes, as applicable). Comments or price adjustment can also be included in an order.

Both registered and non-registered customers can place orders at a store. A *registered customer* is one that has provided information to create a registration profile with the store. This customer has a logon ID and password, which are required when submitting orders at the store. A *non-registered customer* is one that does not have a logon ID and password for shopping at the store, and is considered a guest. A registered customer can always place their own order at the store. Depending on the store's ordering policy, a non-registered customer may need to contact the store to place the order on the customer's behalf. A registered customer may also contact the store enquiring about their orders.

A Customer Service Representative or Operations Manager can use the Place Order wizard to create a new order, or the Change Order notebook to update existing orders. Both of these tools are provided in the WebSphere Commerce Accelerator .

Finding an order

To find a customer order, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

   > B2C

   From the **Operations**menu, click **Find Orders**.

   > B2B

   From the **Sales** menu, click **Find Orders**.
   A search dialog opens.

3. Provide at least one of the following order information. At least one field must be specified.

   - In the **Order number** field, type the order number, which uniquely identifies the order. The system performs an exact search based on the order number you specify (for example, if you type 12345, the system will search for the order with order number 12345).

   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store. The system performs a fuzzy or advanced search based on the customer logon ID you specify (for example, if you type the letter A, the system will search for any occurrences of customer logon IDs containing the letter A, not simply IDs that begin with the letter A).

   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.

   -

     > B2B

     From the **Account** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a search and a list of orders that match the search criteria displays.

Creating an order for a registered customer

To create an order on behalf of a registered customer, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

   > B2C

   From the **Operations**menu, click **Find Customers**.

   > B2B

   From the **Sales** menu, click **Find Customers**.
   A search dialog opens.

3. Search for the customer with which you want to work by providing at least one of the following customer information:

   - In the **Customer logon ID** field, type all or part of the customer's logon ID.
   - In the **First name** field, type all or part of the customer's first name.
   - In the **Last name** field, type all or part of the customer's last name.
   - In the **Phone number 1** field, type all or part of the customer's primary phone number.
   - In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
   - In the **City** field, type all or part of the city of the customer's contact address.
   - In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
   -

     > B2B

     In the **Account** field, select the account name associated with this customer. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a search and a list of customers that match the search criteria displays.

5. Select the check box next to the customer that you want to work with, and click **Place Order** to create a new order. The Place Order wizard launches, displaying the Products page first.

6. Provide appropriate information for the fields and click **Next**to save each page. Click **Back** to return to the previous page, if necessary. Help is available for each page.

7. When you have completed all pages, click **Finish** on the Comments page to create the order.

Creating an order for a non-registered customer

To create an order on behalf of a customer who has not registered with the store and does not have a customer registration profile, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

> B2C

From the **Operations** menu, click **Place Guest Order**.

> B2B

From the **Sales** menu, click **Place Guest Order**.
The Place Order wizard launches, showing the Place Order - Products page first.

3. Click **Add** to search for products to add to the order.

4. Provide appropriate information for the fields and click **Next** to save each page. Click **Back** to return to the previous page, if necessary. Help is available for each page.

5. When you have completed all pages, click **Finish** on the Comments page to create the order.

Creating an order for a business user

To create an order on behalf of a business user, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. From the **Sales** menu, click **Find Customers**.
A search dialog opens.

3. Search for the customer with which you want to work by providing at least one of the following customer information:

   - In the **Customer logon ID** field, type all or part of the customer's logon ID.
   - In the **First name** field, type all or part of the customer's first name.
   - In the **Last name** field, type all or part of the customer's last name.
   - In the **Phone number 1** field, type all or part of the customer's primary phone number.
   - In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.
   - In the **City** field, type all or part of the city of the customer's contact address.
   - In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.
   - In the **Account name** field, select the account name associated with this customer. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of customers that match the search criteria displays.

5. Select the check box next to the customer that you want to work with, and click **Place Order** to create a new order. The Place Order wizard launches, displaying the Products page first.

6. Provide appropriate information for the fields and click **Next** to save each page. Click **Back** to return to the previous page, if necessary. Help is available for each page.

7. When you have completed all pages, click **Finish** on the Comments page to create the order.

Creating a billing address for an order

To create a billing address for an order, and add it to the list of billing addresses for the customer, do the following:

> B2B

Note: Depending on the terms stipulated in the customer's contract, you may not have the authority to change the billing address for the order, or create a new one. If this is the case, then the information on the Billing Address page is read-only.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > B2C

   From the **Operations**menu, click **Find Orders**.

   > B2B

   From the **Sales** menu, click **Find Orders**.
   A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:
   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
   -

     > B2B

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.
5. Open the Change Order notebook by selecting the check box next to the order that you want to work with, and click **Change**.
6. When you open the notebook, the Products page displays. From the left navigation frame, click **Billing Address**. The Billing Address page displays.
7. Click **New**. The Create Billing Address dialog displays.
8. Provide billing information on this dialog as follows:
   a. In the **Address Identifier** field, type a brief (one or two word) description to identify the billing address. For example, if the customer wants to bill an order to their home address, use a billing address identifier called "Home". Likewise, to bill an order to your work location instead of to your home, use an address identifier called "Work".

b. In the **Last Name** field, type the customer's last name.

▶Windows

▶ AIX

▶ Solaris

This field accepts up to 128 single byte characters.

▶ 400

This field accepts up to 128 characters.

c. In the **First Name** field, type the customer's first name.

▶Windows

▶ AIX

▶ Solaris

This field accepts up to 64 single byte characters.

▶ 400

This field accepts up to 64 characters.

d. In the **Street Address** fields, type the customer's billing address in one or more of the address fields.

▶Windows

▶ AIX

▶ Solaris

Each field accepts up to 50 single byte alphanumeric characters.

▶ 400

Each field accepts up to 50 alphanumeric characters.

e. In the **City**, **State/Province**, and **Country/Region** fields, type the city, state or province, and country or region of the customer's billing address.

▶Windows

▶ AIX

▶ Solaris

Each field accepts up to 128 single byte characters.

▶ 400

This field accepts up to 128 characters.

f. In the **ZIP/Postal code** field, type the ZIP or postal code of the customer's billing address.

▶Windows

▶ AIX

▶ Solaris

This field accepts up to 40 single byte alphanumeric characters.

▶ 400

This field accepts up to 40 alphanumeric characters.

g. In the **Phone number** field, type the customer's phone number.

▶Windows

This field accepts up to 32 single byte characters.

This field accepts up to 32 characters.

h. In the **E-mail address** field, type the customer's e-mail address.

This field accepts up to 254 single byte alphanumeric characters.

This field accepts up to 254 alphanumeric characters.

9. Click **OK**. Once created, the system uses the new billing address as the billing address for the current customer order.

Creating a shipping address for a customer order

To create a shipping address for an order, and add it to the list of shipping addresses for the customer, do the following:

Notes:

1. If the customer did not specify a shipping address when the order was created, but wants to specify one now, follow the steps below. For example, for software downloaded from the Internet does not require a shipping address; however, if the customer requests that a CD-ROM be delivered instead, then a shipping address is required.

2.

> B2B

Depending on the terms stipulated in the customer's contract, you may not have the authority to change the shipping address for the order, or create a new one. If this is the case, then the information on this page is read-only.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

> B2C

From the **Operations**menu, click **Find Orders**.

> B2B

From the **Sales** menu, click **Find Orders**.
A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:

    *   In the **Order number** field, type the order number, which uniquely identifies the order.

    *   In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order

History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.

- From the **Order state** drop-down list, select the status of the order, such as new order or pending order.

-

> B2B

From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Open the Change Order notebook by selecting the check box next to the order that you want to work with, and click **Change**.

6. When you open the notebook, the Products page displays. From the left navigation frame, click **Shipping**. The Shipping Address page displays, listing all products in the order and the shipping address identifier to indicate the shipping address selected for the order.

7. Click **Select Another Address**. The Select Shipping Address dialog displays.

8. Click **New**. The Create Shipping Address dialog displays.

9. Provide shipping information on this dialog as follows:

   a. In the **Address Identifier** field, type a brief (one or two word) description to identify the shipping address. For example, if the customer wants to ship an order to their mother, use a shipping address identifier called "Mom". Likewise, to ship an order to your work location instead of to your home, use an address identifier called "Work".

   b. In the **Last Name** field, type the receiver's last name.

   > Windows

   > AIX

   > Solaris

   This field accepts up to 128 single byte characters.

   > 400

   This field accepts up to 128 characters.

   c. In the **First Name** field, type the receiver's first name.

   > Windows

   > AIX

   > Solaris

   This field accepts up to 64 single byte characters.

   > 400

   This field accepts up to 64 characters.

   d. In the **Street Address** fields, type the receiver's billing address in one or more of the address fields.

   > Windows

Each field accepts up to 50 single byte alphanumeric characters.

Each field accepts up to 50 alphanumeric characters.

   e. In the **City**, **State/Province**, and **Country/Region** fields, type the city, state or province, and country or region of the receiver's shipping address.

Each field accepts up to 128 single byte characters.

This field accepts up to 128 characters.

   f. In the **ZIP/Postal code** field, type the ZIP or postal code of the receiver's shipping address.

This field accepts up to 40 single byte alphanumeric characters.

This field accepts up to 40 alphanumeric characters.

   g. In the **Phone number** field, type the receiver's phone number.

This field accepts up to 32 single byte characters.

This field accepts up to 32 characters.

   h. In the **E-mail address** field, type the receiver's e-mail address.

This field accepts up to 254 single byte alphanumeric characters.

This field accepts up to 254 alphanumeric characters.

10. Click **OK**. Once created, the system uses the new shipping address as the shipping address for the current customer order.

Changing an order

To change the details of an order, such as the products selected, billing or shipping addresses, shipping details, payment options, comments to the order, or any adjustments or discounts, do the following:

Note: You can change orders on behalf of customers only if the customer was the original creator of the order and therefore has access to the order. When a Customer Service Representative searches for an order to change using the **Find Orders** menu option, the change will be on behalf of the customer who created the order. When the Customer Service Representative searches for an order by first searching for the customer, then clicking **Orders** from the list of customers, the change will be on behalf of the customer selected, and this may or may not be the customer who created the order. If the customer requesting the order change does not have access to the order, the operation fails and an error message displays.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > B2C

   From the **Operations**menu, click **Find Orders**.

   > B2B

   From the **Sales** menu, click **Find Orders**.
   A search dialog opens.
3. Search for the order with which you want to work by providing at least one of the following order information:
   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
   -

     > B2B

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.
4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.
5. Open the Change Order notebook by selecting the check box next to the order that you want to work with, and click **Change**.
6. Update the fields as required and use the links on the left side to switch between each order page. Help is available for each page.
7. Click **OK** to save the changes and close the notebook.

Changing the quantity of products in an order

To change the quantity of products in an order (for example, a customer may request to buy two books, instead of one), do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

From the **Operations**menu, click **Find Orders**.

From the **Sales** menu, click **Find Orders**.
A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:

- In the **Order number** field, type the order number, which uniquely identifies the order.
- In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
- From the **Order state** drop-down list, select the status of the order, such as new order or pending order.

-

  From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Open the Change Order notebook by selecting the check box next to the order that you want to work with, and click **Change**.

6. When you open the notebook, the Products page displays. Type the appropriate quantity in the **Quantity** field. Ensure that there is sufficient inventory to fulfill the quantity selected.

7. Click **Update Total** to adjust the total cost of the products ordered. The new total displays next to the **Total** field.

8. To make other changes to this order, use the links on the left side to switch between each order page. To save the changed quantity and close the notebook, click **OK**.

Adding a product to an order

To add a product to an existing order that has not been shipped, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

From the **Operations**menu, click **Find Orders**.

From the **Sales** menu, click **Find Orders**.
A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:

   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
   -

     > B2B

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Open the Change Order notebook by selecting the check box next to the order that you want to work with, and click **Change**.

6. When you open the notebook, the Products page displays. Click **Add**. A products search dialog displays to allow you to find products to add to the order.

7. In the **Name**field, type the product name or short description for the product you want to add to the order.

8. In the **SKU** field, type the stock keeping unit (SKU) for the product you want to add to the order.

9. Click **Find**. A list of products, matching your search criteria, displays.

10. From the list of products, do one of the following:

    - If the product you want to add to the order is in this list, type the quantity to order in the **Quantity** field, and click **OK**. The product is added to the list of ordered products on the Products page and the new total for the order displays next to the **Total** field.
    - If the product you want to add to the order is not in this list, or if the search results include too many products, click **Cancel** and refine your search criteria.

11. To make other changes to this order, use the links on the left side to switch between each order page. To save the added product and close the notebook, click **OK**.

Removing a product from an order

To remove a product from an existing order that has not been shipped, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

   > B2C

From the **Operations**menu, click **Find Orders**.

> ▶ B2B

From the **Sales** menu, click **Find Orders**.
A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:

   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
   -

     > ▶ B2B

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Open the Change Order notebook by selecting the check box next to the order that you want to work with, and click **Change**.

6. When you open the notebook, the Products page displays. Select the check box next to the product that you want to remove and click **Remove**. The product is removed from the list of ordered products. The total order amount is updated on the Products page. The new total displays next to the **Total** field.

7. To make other changes to this order, use the links on the left side to switch between each order page. To save the changes and close the notebook, click **OK**.

Selecting another shipping address for an order

To select a different shipping address for an order than the one specified when the order was created, do the following:

Notes:

1. If the customer did not specify a shipping address or method when the order was created, but wants to specify an address now, follow the steps below. For example, for software downloaded from the Internet does not require a shipping address; however, if the customer requests that a CD-ROM be delivered instead, then a shipping address is required.

2.

   > ▶ B2B

   Depending on the terms stipulated in the customer's contract, you may not have the authority to change the shipping address for the order, or create a new one. If this is the case, then the information on this page is read-only.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   B2C

   From the **Operations**menu, click **Find Orders**.

   B2B

   From the **Sales** menu, click **Find Orders**.
   A search dialog opens.
3. Search for the order with which you want to work by providing at least one of the following order information:
   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
   -

     B2B

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.
4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.
5. Open the Change Order notebook by selecting the check box next to the order that you want to work with, and click **Change**.
6. When you open the notebook, the Products page displays. From the left navigation frame, click **Shipping**. The Shipping page displays, listing all products in the order and the shipping address identifier to indicate the shipping address selected for the order.
7. Click **Select Another Address**. The Select Shipping Address dialog displays.
8. Select a shipping address by doing one of the following:
   - If the shipping address you want to use is listed, select the check box next to the address and click **OK**.
   - If the shipping address you want to use is not listed, click **New**. The Create Shipping Address dialog displays. Use this dialog to add a new shipping address for a customer and click **OK**. Once created, the system uses the new shipping address as the shipping address for the current order. Help is available for this dialog.
9. To make other changes to this order, use the links on the left side to switch between each order page. To save the changed shipping address information and close the notebook, click **OK**.

Selecting another shipping method for an order

To select a different shipping method (a combination of the carrier name and a service offered by the shipping company, such as ABC Shipping Company, Overnight Service). for an order than the one specified when the order was created, do the following:

Note: If the customer did not specify a shipping address or method when the order was created, but wants to specify a method now, follow the steps below. For example, for software downloaded from the Internet does not require a shipping method; however, if the customer requests that a CD-ROM be delivered instead, then a shipping method is required.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.
   > **B2C**

   From the **Operations**menu, click **Find Orders**.

   > **B2B**

   From the **Sales** menu, click **Find Orders**.
   A search dialog opens.
3. Search for the order with which you want to work by providing at least one of the following order information:
   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
   -
     > **B2B**

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.
4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.
5. Open the Change Order notebook by selecting the check box to the left of the order that you want to work with, and click **Change**.
6. When you open the notebook, the Products page displays. From the left navigation frame, click **Shipping**. The Shipping page displays, listing all products in the order and the shipping address identifier to indicate the shipping address selected for the order.
7. Select the check box to the left of the product you want to work with, and click **Select Another Method**. The Select Shipping Method dialog displays, listing the methods available for shipping the order.

8. Select the check box to the left of the shipping method you want to use, and click **OK**.

9. To make other changes to this order, use the links on the left side to switch between each order page. To save the changed shipping method and close the notebook, click **OK**.

Changing the total price of an order

To change the total price of an order, such adjusting the total to compensate a customer for a delay in delivering an order, or to change the shipping charges, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.
    > B2C

    From the **Operations**menu, click **Find Orders**.

    > B2B

    From the **Sales** menu, click **Find Orders**.
    A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:

    • In the **Order number** field, type the order number, which uniquely identifies the order.

    • In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.

    • From the **Order state** drop-down list, select the status of the order, such as new order or pending order.

    •
        > B2B

        From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Open the Change Order notebook by selecting the check box next to the order that you want to work with, and click **Change**.

6. When you open the notebook, the Products page displays. From the left navigation frame, click **Adjustments**. The Adjustments page displays, providing a summary of the order.

7. To provide one or more price adjustments, do the following:

    • To include an overall price adjustment, type a new amount in the **Minus adjustment** field. This price adjustment is calculated before tax and shipping charges have been applied, but after any discounts (such as promotions) to the order.

- To override the shipping charge calculated by the system, type a new amount in the **Shipping**field. You may want to do this to waive the shipping cost for an order.
- To honor a coupon, type the ID that uniquely identifies the coupon in the **Coupon**field. The value of the coupon is subtracted from the total cost of the order, before discount, tax, and shipping charges are applied.

8. Click **Recalculate** to include any price adjustments to the ordered. The new total displays in the **Order Total** field, in the customer's preferred currency. If customers have not provided their preferred currency during registration, the price is displayed using the store's default currency.

9. If you decide not to adjust the order total, and want to revert back to the original amounts, click **Undo**.

10. To save the price adjustment and close the notebook, click **OK**.

Changing the payment option for an order

To change the payment option for an order, such as whether to use online or offline payment, or to change credit card information for online payments, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

▶ B2C

From the **Operations**menu, click **Find Orders**.

▶ B2B

From the **Sales** menu, click **Find Orders**.
A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:
   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
   -

     ▶ B2B

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Open the Change Order notebook by selecting the check box next to the order that you want to work with, and click **Change**.

6. When you open the notebook, the Products page displays. From the left navigation frame, click **Payment**. The Payment page displays.

7. Select the type of payment. Options within this list depend on the type of payment setting, such as the WebSphere Commerce default payment method for offline payments, CyberCash for online payments, SET Secure Electronic Transaction and Merchant Initiated Authorization (MIA) for online payments that do not require customers to use an online wallet, or a custom payment method.

8. If you selected an online payment method, such as CyberCash, SET Secure Electronic Transaction and MIA, or a custom online payment method from the **Payment method** drop-down list, the credit card type is displayed. Change information for this credit card by updating any or all of the following information, as required:

   • In the **Credit card number** field, type the credit card number used to pay for the order.

   • In the **Expiry month** drop-down list, select the month that the credit card expires.

   • In the **Expiry year** drop-down list, select the year that the credit card expires.

9.

   ▶ B2B

   In the **Purchase order number** field, type the purchase order number that the customer must provide when ordering at the store. The purchase order number authenticates the customer as one that is authorized to order from the store, as stipulated in the terms and conditions within the contract between the store and the customer.

10. To make other changes to this order, use the links on the left side to switch between each order page. To save the changed payment options and close the notebook, click **OK**.

Selecting another billing address for an order

To select a different billing address for a customer order than the one specified when the order was created, do the following:

▶ B2B

Note: Depending on the terms stipulated in the customer's contract, you may not have the authority to change the billing address for the order, or create a new one. If this is the case, then the information on the Billing Address page is read-only.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

   ▶ B2C

   From the **Operations**menu, click **Find Orders**.

   ▶ B2B

   From the **Sales** menu, click **Find Orders**.
   A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:

- In the **Order number** field, type the order number, which uniquely identifies the order.
- In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
- From the **Order state** drop-down list, select the status of the order.

-
    > ▶ B2B

    From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.
5. Open the Change Order notebook by selecting the check box next to the order that you want to work with, and click **Change**.
6. When you open the notebook, the Products page displays. From the left navigation frame, click **Billing Address**. The Billing Address page displays.
7. Select a billing address by doing one of the following:
   - If the billing address you want to use is listed, select the check box next to the address and click **OK**.
   - If the billing address you want to use is not listed, click **New**. The Create Billing Address dialog displays. Use this dialog to add a new billing address for a customer and click **OK**. Once created, the system uses the new billing address as the billing address for the current order. Help is available for this dialog.
8. To make other changes to this order, use the links on the left side to switch between each order page. To save the changed billing address information and close the notebook, click **OK**.

Adding a comment to an order

To add a comment to an order, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.
    > ▶ B2C

    From the **Operations**menu, click **Find Orders**.

    > ▶ B2B

    From the **Sales** menu, click **Find Orders**.
    A search dialog opens.
3. Search for the order with which you want to work by providing at least one of the following order information:
   - In the **Order number** field, type the order number, which uniquely identifies the order.

- In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.

- From the **Order state** drop-down list, select the status of the order, such as a submitted order or a shipped order.

-

  > ▶ B2B

  From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Select the check box next to the order that you want to work with and click **Add Comments**. A dialog opens.

6. In the **Comments**scroll box, type the comment you want to include with the order.

   > ▶ Windows

   > ▶ AIX

   > ▶ Solaris

   This scroll box accepts up to 1024 single byte alphanumeric characters.

   > ▶ 400

   This scroll box accepts up to 1024 alphanumeric characters.

7. To e-mail this comment to customers, select the **Send this comment to the customer** check box. The **E-mail address**field displays. By default, this field is populated with the e-mail address specified during registration, if the customer has registered and has provided an e-mail address. To change the default e-mail address, type customer's e-mail address in the **E-mail address**field.

8. Click **OK** to add the comment to the order and if selected, to send the comment to the customer.

Splitting an order

You may want to split an order if a customer has selected multiple products for the order, but there is currently insufficient inventory for at least one product. You can split the order so that available products are shipped now, remaining products are backordered until inventory replenishes. To split an order, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

   > ▶ B2C

   From the **Operations**menu, click **Find Orders**.

   > ▶ B2B

   From the **Sales** menu, click **Find Orders**.
   A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:
   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
   -

     > B2B

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Open the Change Order notebook by selecting the check box next to the order that you want to work with, and click **Change**.

6. When you open the notebook, the Products page displays. From the left navigation frame, click **Product Availability**. The Product Availability page displays, listing all products in the order, including the date when products are available for shipping. Note that by default, **No** displays in the **Move to Separate Order** column, indicating that the order will not be split and the product will not be move to a second or back order. The **No** status displays regardless of the product availability, so you will need to change this status for products that are not yet available.

7. To specify whether or not products selected for the order should remain in the current order or be moved to a second or back order, do one of the following:
   - If the product availability date is the current date or earlier, the product is ready to be shipped. Ensure that the **Move to Separate Order** column displays **No**, to indicate that there is no need to split the order and move the unavailable products to a second order. If a **Yes** status displays, select the check box next to the product that you want to work with and click **Keep in Current Order**.
   - If the product availability date is later than the current date, there is insufficient inventory and the product is not ready to be shipped. In this case, do one of the following:
     - To split the order, select the check box next to the products that you want to ship at a later date, and click **Move to Separate Order**. The **Move to Separate Order** column displays **Yes** to indicate that the moved products will not be shipped until inventory replenishes. The other products in the list (with a **Move to Separate Order** status of **No**) will be shipped once the order has been submitted.
     - To wait for all products in the order are available for shipping, select the check box next to the products that you want to work with and click **Keep in Current Order**. The **Move to Separate Order** column displays **No** for each product selected, to indicate that the order will not be shipped until there is sufficient inventory for all products in the order.

– If a product is not currently available, rather than split the order or wait for inventory to be fulfilled, you can remove it from the order. To remove a product, select the check box next to the product that you want to work with and click **Remove**. The product is no longer listed on this page, nor is it part of the order.

8. To make other changes to this order, use the links on the left side to switch between each order page (see the step below for an optional step). To save the changed shipping address information and close the notebook, click **OK**.

9. If you want to include a reason why the you split the order, waited for all products, or removed products, do the following:

a. From the left navigation frame, click **Comments**. The Comments page displays.

b. In the **Comments**scroll box, type the comment you want to include with the order.

   [Windows]

   [AIX]

   [Solaris]

   This scroll box accepts up to 1024 single byte alphanumeric characters.

   [400]

   This scroll box accepts up to 1024 alphanumeric characters.

c. To e-mail this comment to customers, select the **Send this comment to the customer** check box. The **E-mail address**field displays. By default, this field is pre-filled with the e-mail address specified during registration, if the customer has registered and has provided an e-mail address.

d. To change the default e-mail address, type customer's e-mail address in the **E-mail address**field.

e. Click **OK** to add the comment to the order and if selected, to send the comment to the customer.

Viewing comments added to an order

To view the comments added to an existing order, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

   [B2C]

   From the **Operations**menu, click **Find Orders**.

   [B2B]

   From the **Sales** menu, click **Find Orders**.
   A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:

   • In the **Order number** field, type the order number, which uniquely identifies the order.

   • In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.

- From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
-

> **B2B**

From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.
5. Select the check box next to the order that you want to work with and click **Summary**. A summary of the order displays.
6. View a list of comments for the order from the **Comments** section.
7. Click **Cancel** to close the page.

Viewing an order summary

To view a summary that details an order, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

> **B2C**

From the **Operations**menu, click **Find Orders**.

> **B2B**

From the **Sales** menu, click **Find Orders**.
A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:
   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
   -

     > **B2B**

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Select the check box next to the order that you want to work with and click **Summary** to view the details of the order.

6. Click **OK** to close the page.

Printing an order summary

To print a summary that details a order, including products ordered, billing and shipping addresses, shipping and payment options, and any comments and price adjustments, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

> B2C

From the **Operations**menu, click **Find Orders**.

> B2B

From the **Sales** menu, click **Find Orders**.
A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:

   - In the **Order number** field, type the order number, which uniquely identifies the order.

   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.

   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.

   -

     > B2B

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Select the check box next to the order that you want to work with and click **Summary** to view the details of the order.

6. Click **Print** to print the customer summary.

7. Click **OK** to close the page.

Canceling an order

To cancel an order, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

> B2C

From the **Operations**menu, click **Find Orders**.

> B2B

From the **Sales** menu, click **Find Orders**.
A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:

   - In the **Order number** field, type the order number, which uniquely identifies the order.

   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.

   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.

   -

     > B2B

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Select the check box next to the order that you want to work with and click **Cancel Order**. A dialog opens.

6. In the **Comments** scroll box, use the default text provided, or type another reason for canceling the order, for example, the customer has changed their mind about the purchase.

   Windows

   AIX

   Solaris

   This scroll box accepts up to 1024 single byte alphanumeric characters.

   400

   This scroll box accepts up to 1024 alphanumeric characters.

7. To e-mail this comment to customers, select the **Send this comment to the customer** check box. The **E-mail address**field displays. By default, this field is populated with the e-mail address specified during registration, if the customer has registered and has provided an e-mail address. To change the default e-mail address, type customer's e-mail address in the **E-mail address**field.

8. Click **OK** to change the status of the order from its original order state, such as a back order, to canceled, and if selected, to send the comment to the customer.

Processing payment for an order

To process online payment for a customer order, such as approve payments, deposit payments, settle payments, find payments, and find batch payments, use Payment Manager. To launch Payment Manager from the WebSphere Commerce Accelerator, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Open Payment Manager, by doing one of the following:
   - To work with a specific order, do the following:
     a.

        > B2C

        From the **Operations**menu, click **Find Orders**.

        > B2B

        From the **Sales** menu, click **Find Orders**.
        A search dialog opens.
     b. Search for the order with which you want to work by providing at least one of the following order information:
        – In the **Order number** field, type the order number, which uniquely identifies the order.
        – In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
        – From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
        –

           > B2B

           From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.
     c. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.
   - To work with any order, do one of the following:
     – To work with a single order, select the check box next to the customer's order that you want to work with and click **Process Payment**. Payment Manager launches.
     – To work with multiple orders, select the appropriate check boxes and click **Process Payment**. Payment Manager launches.
     – To work with all the orders in the list, select the check box icon at the top left of the list and click **Process Payment**. Payment Manager launches.
3. Follow the Payment Manager online help for details on how to process online payment with Payment Manager.

Changing payment processing for an order

To change payment processing information for an order, such as approve payments, deposit payments, settle payments, find payments, and find batch payments, use Payment Manager. To launch Payment Manager from the WebSphere Commerce Accelerator, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. Open Payment Manager, by doing one of the following:
   - To work with a specific order, do the following:
     a.

        > B2C

        From the **Operations**menu, click **Find Orders**.

        > B2B

        From the **Sales** menu, click **Find Orders**.
        A search dialog opens.
     b. Search for the order with which you want to work by providing at least one of the following order information:
        – In the **Order number** field, type the order number, which uniquely identifies the order.
        – In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
        – From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
        –

           > B2B

           From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.
     c. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.
   - To work with any order, do one of the following:
     – To work with a single order, select the check box next to the customer's order that you want to work with and click **Process Payment**. Payment Manager launches.
     – To work with multiple orders, select the appropriate check boxes and click **Process Payment**. Payment Manager launches.
     – To work with all the orders in the list, select the check box icon at the top left of the list and click **Process Payment**. Payment Manager launches.
3. Follow the Payment Manager online help for details on how to process online payment with Payment Manager.

Viewing the payment status for an order

To view the payment status for an order, do the following:
1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > B2C

From the **Operations**menu, click **Find Orders**.
<span class="b2b">

> B2B

From the **Sales** menu, click **Find Orders**.
<span>A search dialog opens.

3. Search for the order with which you want to work by providing at least one of the following order information:
   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
   -

     > B2B

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Locate the customer's order from the list and view the status of the order in the **Payment Status** column.

6. Click **OK** to close the page.

Viewing the status of an order

To view the status of an order, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

   > B2C

   From the **Operations**menu, click **Find Orders**.

   > B2B

   From the **Sales** menu, click **Find Orders**.
   A search dialog opens.

3. Search for the order with which you want to work by providing any of the following order information:
   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.

- From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
-

  > B2B

  From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Locate the customer's order from the list and view the status of the order in the **Order Status** column.

6. Click **OK** to close the page.

Viewing invoices for an order

To view invoices associated with an order, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. From the

   > B2C

   Operationsmenu, click **Find Orders**. A search dialog opens.
   From the

   > B2B

   Sales menu, click **Find Orders**. A search dialog opens.

3. Search for the order with which you want to work by providing any of the following order information:
   - In the **Order number** field, type the order number, which uniquely identifies the order.
   - In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the Order History list for a particular customer, the customer logon ID is pre-filled with the customer's logon ID for the store.
   - From the **Order state** drop-down list, select the status of the order, such as new order or pending order.
   -

     > B2B

     From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated, and this organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store. For example, the organization IBM may have contracts with the ABC Office Supplies Store.

4. Click **Find**. The system performs a fuzzy search and a list of orders that match the search criteria displays.

5. Select the check box to the left of the order that you want to work with, and click **View Invoice**. The View Invoices dialog displays, listing all invoices for the order, as applicable.

6. From the list, click the link to the invoice you want to view.

7. Click **OK** to close the dialog.

Returns and refunds

WebSphere Commerce supports returns using return merchandise authorization (RMA) functionality. A *return* is a record of a customer's request for a *refund*, to *return* merchandise, or both. The term is used whether an RMA is issued in advance of merchandise receipt or the transaction is begun at the time of merchandise receipt.

If a customer is not satisfied with their purchase, the merchant can offer a refund for the purchase. To return an order (or an order item or a product within an order), it must first be in one of the following states:

1.
   - R - Released
   - S - Shipped
   - D - Deposited
   - F - Ready for remote fulfillment
   - G - Pending remote fulfillment
   - C - Completed

However, to return an order (or order item within an order) using the New Return wizard in the WebSphere Commerce Accelerator, both the order and order item within the order must be in either S (shipped) or D (deposited) state. To return items in any state (R, F, G, C and including S and D), use the ReturnItemAdd command.

Some products may be configured as non-refundable; for example, for hygienic reasons, intimate apparel sold directly to consumers would not be refundable. Whether or not the merchandise must be returned for a refund is configurable at the product level. For example a specialty food dealer may want non-perishable food products returned but not fresh produce. A suggested refund amount and possible methods for issuing refunds are calculated according to system settings and policies. System settings and policies are overridable on a case-by-case basis with the appropriate level of security. The merchant may choose to issue RMAs in preparation for receiving returned merchandise and issuing a refund.

The possible payment methods for issuing a refund are calculated using system settings and policies. The default implementation utilizes a simple calculation. A refund may be issued against the original form of payment or to a line of credit, depending upon system policies. See the CalculateReturnCreditVehicleCmdImpl task command for details.

If the merchant chooses to issue RMAs, these can be created using a self-service interface utilizing a automatic approval mechanism built into the returns management system. A Customer Service Representative can also create a RMA or modify an existing one. The Customer Service Representative has the ease of use provided by the automatic approval mechanism but also has the flexibility to make any necessary adjustments and manually approve an RMA. Using the commands provided in the returns system, a customer can request an authorization to return

products they have ordered. With the Customer Service Representative's assistance, an RMA can also be issued for products ordered by others, such as gifts, products ordered outside the customer's business organization, or for items where the original order can not be identified. Refer to the automatic approval related link below for details about the automatic approval mechanism.

Use the New Return wizard and Change Return notebook within the WebSphere Commerce Accelerator to create new returns or edit existing returns. To launch the New Return wizard, first search for an existing order or a customer, then click the appropriate button on the search results list to launch the wizard. To open the Change Return notebook, first search for the existing return and then click the appropriate button on the search results list to open the notebook. For more details on how to create or change a return, refer to the related links below.

Finding a return

To find a return, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > B2C

   From the **Operations**menu, click **Find Returns**.

   > B2B

   From the **Sales** menu, click **Find Returns**.
   A search dialog opens.

3. Provide at least one of the following return information. At least one field must be specified.
   Note: The system performs a fuzzy search based on the originator logon ID provided, and an exact search based on the values provided for all other fields on this dialog.

   * In the **Return number** field, type the return number, which uniquely identifies the return.
   * In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
   * In the **Originator logon ID** field, type the following:

     > B2C

     The store logon ID for the customer <span class="b2b">who originated the return.<span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store. The system performs a fuzzy or advanced search based on the logon ID you specify (for example, if you type the letter A, the system will search for any occurrences of logon IDs containing the letter A, not simply IDs that begin with the letter A).

     > B2B

     The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM

may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

*

> B2B

From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.

* In the **Return status** drop-down list, select the status of the return, such as pending or canceled.

4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.

Creating a return

To create a return on behalf of a customer, do the following:

Note: To return an order (or an order item or a product within an order), the it must first be in one of the following states:

1.

* R - Released
* S - Shipped
* D - Deposited
* F - Ready for remote fulfillment
* G - Pending remote fulfillment
* C- Completed

However, to return an order (or order item within an order) using the New Return wizard in the WebSphere Commerce Accelerator as described below, both the order and order item within the order must be in either S (shipped) or D (deposited) state. To return items in any state (R, F, G, C and including S and D), use the ReturnItemAdd command.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2. You can create a return by searching for the original order, or by searching for the customer, and then launching the New Return wizard, by doing one of the following:

*

> B2C

From the **Operations**menu, click **Find Orders**.

> B2B

From the **Sales** menu, click **Find Orders**.

a. A search dialog opens. Search for the order that contains the product for the return, by providing at least one of the following order information:

– In the **Order number** field, type the order number, which uniquely identifies the order.

– In the **Customer logon ID** field, type the customer's unique store logon ID. If this search dialog was launched by clicking **Find Orders** from the **Orders** list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

– From the **Order state** drop-down list, select the status of the order, such as new or pending.

–

> B2B

From the **Account** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated. The organization has defined contracts with the store, stipulating terms for the customer to shop at the store.

b. Click **Find**. The system performs a search and a list of orders that match the search criteria displays.

c. Select the check box next to the order that you want to work with, and click **New Return** to create a new return. The New Return wizard launches, displaying the Products From Order - Search Results page first.

•

> B2C

From the **Operations** menu, click **Find Customers**.

> B2B

From the **Sales** menu, click **Find Customers**.

a. A search dialog opens. Provide any of the following customer information:

– In the **Customer logon ID** field, type all or part of the customer's logon ID.

– In the **First name** field, type all or part of the customer's first name.

– In the **Last name** field, type all or part of the customer's last name.

– In the **Phone number 1** field, type all or part of the customer's primary phone number.

– In the **E-mail address 1** field, type all or part of the customer's primary e-mail address.

– In the **City** field, type all or part of the city of the customer's contact address.

– In the **ZIP/Postal code** field, type all or part of the ZIP or postal code of the customer's contact address.

–

> B2B

In the **Account name** field, select the account name associated with this customer. This is typically the name of the organization with which the customer is associated. The organization has defined contracts with the store, stipulating terms for the customer to shop at the store.

b. Click **Find**. The system performs a search and a list of customers that match the search criteria displays.

c. Select the check box next to the order that you want to work with, and click **New Return** to create a new return. The New Return wizard launches, displaying the Products page first.

3. Provide appropriate information for the fields and click **Next**to save each page. Click **Back** to return to the previous page, if necessary. Help is available for each page.

4. When you have completed all pages, click **Finish** on the Confirmation page to create the return.

Changing a return

To change the details of a return, such as the quantity of products for the return, the credit method, or any comments to specific products or the entire return, do the following:

Note: You can change returns on behalf of customers only if the customer was the original creator of the return and therefore has access to the return. When a Customer Service Representative searches for a return to change using the **Find Returns**menu option, the change will be on behalf of the customer who created the return. When the Customer Service Representative searches for an order by first searching for the customer, then clicking **Returns** from the list of customers, the change will be on behalf of the customer selected, and this may or may not be the customer who created the return. If the customer requesting the return change does not have access to the return, the operation fails and an error message displays.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   ▶ B2C

   From the **Operations**menu, click **Find Returns**.

   ▶ B2B

   From the **Sales** menu, click **Find Returns**.
   A search dialog opens.
3. Search for the return that you want to work with by providing at least one of the following returns information:
   - In the **Return number** field, type the return number, which uniquely identifies the return.
   - In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
   - In the **Originator logon ID** field, type the following:

     ▶ B2C

     The store logon ID for the customer <span class="b2b">who originated the return. If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.
     <span>

     ▶ B2B

     The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

•

> B2B

From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.

- In the **Return status** drop-down list, select the status of the return, such as pending or canceled.

4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.

5. Open the Change Return notebook by selecting the check box next to the return that you want to work with, and click **Change**.

6. Update the fields as required and use the links on the left side to switch between each returns page. Help is available for each page.

7. Click **OK** to save the changes and close the notebook.

Adding a product to a return

To add a product to an existing customer return that has not been processed (that is, an amount has not been credited to the customer's credit card or line of credit), do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

> B2C

From the **Operations**menu, click **Find Returns**.

> B2B

From the **Sales** menu, click **Find Returns**.
A search dialog opens.

3. Search for the return that you want to work with by providing at least one of the following returns information:
Note: The system performs an exact search based on the order number provided, and a fuzzy or advanced search based on the values provided for all other fields on this dialog.

- In the **Return number** field, type the return number, which uniquely identifies the return.

- In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order. The system performs an exact search based on the order number you specify (for example, if you type 12345, the system will search for the order with order number 12345).

- In the **Originator logon ID** field, type the following:

> B2C

The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

> B2B

The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not

the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

- ▸ **B2B**

  From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.
- In the **Return status** drop-down list, select the status of the return, such as pending or canceled.

4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.

5. Open the Change Return notebook by selecting the check box next to the return that you want to work with, and click **Change**.

6. When you open the notebook, the Products page displays. Click **Add**. A product search dialog opens, allowing you to find products to add to the return.

7. Depending on where you want the system to search for products, do one of the following:
   - To search for products based on information about an existing order, select the **Search from an existing customer order** radio button and provide any of the order information below. Select this option if you know information about the order that contains the product to be returned. Provide at least one of the following order information:
     - In the **Order number** field, type the order number, which uniquely identifies the order that contains the product to be returned.
     - In the **Customer logon ID** field, type the store logon ID for the customer that has placed the order. If the customer logon ID for the originator of the return is known, then the customer logon ID is populated with the customer's logon ID for the store.
     - ▸ **B2B**

       From the **Account name** drop-down list, select the customer's account name. This is typically the name of the organization with which the customer is associated. The organization has defined contracts with the store, stipulating terms and conditions for the customer to shop at the store.

     Note: To return a product, it must have shipped to a customer as part of an existing order. If the product is not in shipped state in the WebSphere Commerce database, the product is not considered returnable and this will be indicated on the Products From Order - Search Results page as an uneditable row in the list.
   - To search for products within the store's online catalog, select the **Search from the store's online catalog** radio button and provide any of the product information below. Select this option if the customer who is originating the return is known but you do not know information about the order that contains the product to be returned. Note that this option is only available if a product is already included in the return and you want to add more products to the return. If the return does not currently contain any

products, use the **Search from an existing customer order** option. Provide
at least one of the following product information:

- – In the **Product name** field, type all or part of the product name for the
  product you want to add to the return; for example, "Women's sweater."
- – In the **SKU** field, type all or part of the SKU for the product you want to
  add to the return.
- – In the **Short description** field, type all or part of the short description for
  the product you want to add to the return; for example, "Women's red
  wool sweater."

8. Click **Find**. A list of products matching your search criteria displays.

9. From the list of products, do one of the following:

   - If the product you want to add to the return is in this list, type the return
     quantity in the **Quantity** field, and click **OK**. The product is added to the
     list of products requiring a refund, on the Products page.
     Note: If the product to be added to the return is from the store's online
     catalog, the credit amount will not be calculated by the system. You must
     manually enter the amount in the **Credit Adjustment** field on the Products
     page.
   - If the product you want to add to the customer return is not in this list, or
     if the search results include too many products, click **Cancel** and refine
     your search criteria.

10. From the Products page, click **Update Total**to include the cost, before taxes or
    any other charges to the product, of the newly added product to the the total
    credit amount for the entire return. The new total displays next to the **Total**
    field.

11. To make other changes to this return, use the links on the left side to switch
    between each returns page. To save the added product and close the notebook,
    click **OK**.

Removing a product from a return

To remove a product from an existing return that has not been processed (that is,
an amount has not been credited to the customer's credit card or line of credit), do
the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one
   or more menus display.

2.

   > B2C

   From the **Operations**menu, click **Find Returns**.

   > B2B

   From the **Sales** menu, click **Find Returns**.
   A search dialog opens.

3. Search for the return that you want to work with by providing at least one of
   the following returns information:

   - In the **Return number** field, type the return number, which uniquely
     identifies the return.
   - In the **Order number** field, type the order number that contains the product
     to be returned, which uniquely identifies the order.

- In the **Originator logon ID** field, type the following:

  > B2C

  The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

  > B2B

  The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

-

  > B2B

  From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.
- In the **Return status** drop-down list, select the status of the return, such as pending or canceled.

4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.
5. Open the Change Return notebook by selecting the check box next to the return that you want to work with, and click **Change**.
6. When you open the notebook, the Products page displays. Select the check box next to the product to be removed, and click **Remove**. The total credit amount, before taxes or any other charges to the product, is updated on the Products page. The new total displays next to the **Total** field.
7. To make other changes to this return, use the links on the left side to switch between each returns page. To save the removed product and close the notebook, click **OK**.

Changing the quantity of products in a return

To change the quantity of products in a return (for example, a customer may request to return only two of three books purchased), do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > B2C

   From the **Operations**menu, click **Find Returns**.

   > B2B

   From the **Sales** menu, click **Find Returns**.
   A search dialog opens.
3. Search for the return that you want to work with by providing at least one of the following returns information:
   - In the **Return number** field, type the return number, which uniquely identifies the return.

- In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the customer order.
- In the **Originator logon ID** field, type the following:

> **B2C**

The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

> **B2B**

The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

-

> **B2B**

From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.
- In the **Return status** drop-down list, select the status of the return, such as pending or canceled.

4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.
5. Open the Change Return notebook by selecting the check box next to the return that you want to work with, and click **Change**.
6. When you open the notebook, the Products page displays, listing all products and their quantities, in the return. Type the appropriate quantity in the **Quantity** field.
7. Click **Update Total** to adjust the total cost, before taxes or any other charges to the product, of the products in the return. The new total displays next to the **Total** field.
8. To make other changes to this return, use the links on the left side to switch between each returns page. To save the changed quantity and close the notebook, click **OK**.

Specifying returns to the fulfillment center

Once a product is added to a return, the system determines whether or not the customer should return the product, and the status is indicated as a **Yes** or **No** value. To change the status, select **Yes** or **No** as appropriate. Often, whether or not products should be returned to the fulfillment center depends on one of the following:

- The nature of the product. For example, broken glassware should not be returned. In this case, select **No** as the return to fulfillment center status.
- The condition of the product. For example, if glassware has been returned because the customer changed their mind select **Yes** as the return to fulfillment center status. However, if the customer wants to return the glassware because it

arrived broken, the glassware should not be returned to the fulfillment center to be sold to another customer. In this case, select **No** as the return to fulfillment center status.

To specify whether or not a product needs to be returned to a fulfillment center, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > B2C

   From the **Operations**menu, click **Find Returns**.

   > B2B

   From the **Sales** menu, click **Find Returns**.
   A search dialog opens.
3. Search for the return that you want to work with by providing at least one of the following returns information:
   - In the **Return number** field, type the return number, which uniquely identifies the return.
   - In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
   - In the **Originator logon ID** field, type the following:

     > B2C

     The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

     > B2B

     The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

   -

     > B2B

     From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.
   - In the **Return status** drop-down list, select the status of the return, such as pending or canceled.
4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.
5. Open the Change Return notebook by selecting the check box next to the return that you want to work with, and click **Change**.
6. When you open the notebook, the Products page displays. Select the check box next to the product with which you want to work.

7. Specify whether or not a product needs to be returned to a fulfillment center, as follows:

   Note: If the system previously determined that the product does not need to be returned to the fulfillment center, and you override this, then the return must be manually approved by a user with this authority, such as the Customer Service Supervisor.

   - If the product was purchased individually (that is, not as part of a kit), from the **Return to Fulfillment Center** column, select **Yes** or **No** to indicate whether or not the selected product needs to be returned to the fulfillment center.
   - If the product was purchased as part of a kit, do the following:
     a. Select the check box next to the product with which you want to work and click **Kit Details**. The Kit Details dialog opens, providing information about the kit name, SKU, and the individual products within the kit.
     b. From the **Return to Fulfillment Center** column, select **Yes** or **No** to indicate whether or not the selected product needs to be returned to the fulfillment center.

8. To make other changes to this return, use the links on the left side to switch between each returns page. To save your changes and close the notebook, click **OK**.

Changing the return reason

To change the reason for returning a product, regardless of whether or not the product is physically returned to the store, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

   > B2C

   From the **Operations**menu, click **Find Returns**.

   > B2B

   From the **Sales** menu, click **Find Returns**.
   A search dialog opens.

3. Search for the return that you want to work with by providing at least one of the following returns information:

   - In the **Return number** field, type the return number, which uniquely identifies the return.
   - In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
   - In the **Originator logon ID** field, type the following:

     > B2C

     The store logon ID for the customer who originated the return. If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

     > B2B

     The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not

the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

-

  B2B

  From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.

- In the **Return status** drop-down list, select the status of the return, such as pending or canceled.

4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.
5. Open the Change Return notebook by selecting the check box next to the return that you want to work with, and click **Change**.
6. When you open the notebook, the Products page displays. From the **Reason for Return** column, select the reason for the return. For example, if a customer purchased a radio, but the volume button does not work properly, select **Defective** from the list.
7. To make other changes to this return, use the links on the left side to switch between each returns page. To save the new return reason and close the notebook, click **OK**.

Changing the credit amount for a return

To change the credit amount for a return (that is, the amount to credit a customer's credit card or line of credit), do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   B2C

   From the **Operations** menu, click **Find Returns**.

   B2B

   From the **Sales** menu, click **Find Returns**.
   A search dialog opens.

3. Search for the return that you want to work with by providing at least one of the following returns information:

   - In the **Return number** field, type the return number, which uniquely identifies the return.
   - In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
   - In the **Originator logon ID** field, type the following:

     B2C

     The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns** from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

     B2B

The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

-

> B2B

From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.
- In the **Return status** drop-down list, select the status of the return, such as pending or canceled.

4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.
5. Open the Change Return notebook by selecting the check box next to the return that you want to work with, and click **Change**.
6. When you open the notebook, the Products page displays. From the **Credit Adjustment** column, type a new credit amount. For example, if the system suggested a credit amount but you want to override it, type the new amount here.
7. To make other changes to this return, use the links on the left side to switch between each returns page. To save the new credit amount and close the notebook, click **OK**.

Viewing kit details for a return

A kit contains multiple products, is ordered and returned as a unit, and has one price and one SKU. The information about the products contained in a dynamic kit is controlled by an external *configurator*. To view the details of a kit, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

> B2C

From the **Operations**menu, click **Find Returns**.

> B2B

From the **Sales** menu, click **Find Returns**.
A search dialog opens.

3. Search for the return that you want to work with by providing at least one of the following returns information:
- In the **Return number** field, type the return number, which uniquely identifies the return.
- In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
- In the **Originator logon ID** field, type the following:

> B2C

The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

> B2B

The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

•

> B2B

From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.

• In the **Return status** drop-down list, select the status of the return, such as pending or canceled.

4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.

5. To view kit details, use one of the following methods:
   • Change Return notebook method:
      a. Open the Change Return notebook by selecting the check box next to the return that you want to work with, and click **Change**.
      b. When you open the notebook, the Products page displays. Select the check box next to the product with which you   want to work and click **Kit Details**. The Kit Details dialog opens, providing information about the kit name, SKU, and the individual products within the kit.
   • Return summary method:
      a. Select the check box next to the return that you want to work with and click **Summary**to view the details of the return.
      b. From the **Product Name** column, view a list of products and kit details.

6. Click **OK** to close the page.

Changing the credit method for a return

To change the method in which the customer will be credited for a return, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

> B2C

From the **Operations**menu, click **Find Returns**.

> B2B

From the **Sales** menu, click **Find Returns**.
A search dialog opens.

3. Search for the return that you want to work with by providing at least one of the following returns information:

- In the **Return number** field, type the return number, which uniquely identifies the return.
- In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
- In the **Originator logon ID** field, type the following:

> B2C

The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

> B2B

The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

-

> B2B

From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.
- In the **Return status** drop-down list, select the status of the return, such as pending or canceled.
4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.
5. Open the Change Return notebook by selecting the check box next to the return that you want to work with, and click **Change**.
6. When you open the notebook, the Products page displays. From the left navigation frame, click **Credit Method**. The Credit Method page displays.
7. From the drop-down list, select the credit method for the return. Depending on the terms within the contract used for the original order and the return, the list can display the following options:
   - To refund the customer by the same payment method used to bill the original order, select **Same as order**. Note that if you are refunding the customer by credit card, the credit amount will be applied to the same credit card that was used to purchase the original order.
   - To refund the customer by crediting to a line of credit, select **Line of credit**.
8. To make other changes to this return, use the links on the left side to switch between each returns page. To save the changed credit method and close the notebook, click **OK**.

Adding a comment to a return

To add a comment to a specific product within a return or to the return as a whole, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

> B2C

From the **Operations**menu, click **Find Returns**.

> B2B

From the **Sales** menu, click **Find Returns**.
A search dialog opens.

3. Search for the return that you want to work with by providing at least one of the following returns information:

- In the **Return number** field, type the return number, which uniquely identifies the return.
- In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
- In the **Originator logon ID** field, type the following:

> B2C

The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

> B2B

The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

-

> B2B

From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.

- In the **Return status** drop-down list, select the status of the return, such as pending or canceled.

4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.

5. Open the Change Return notebook by selecting the check box next to the return that you want to work with, and click **Change**.

6. When you open the notebook, the Products page displays. Depending on the type of comment you want to include, do one of the following:

- To add a comment to the return as a whole, such as a note about why the customer requested a refund for all three products in the original order, do the following:
  a. From the left navigation frame, click **Comments**. The Comments page displays. If there are past comments included with this return, you can also view them from this page.

b. In the scroll box on this page, type the comment you want to include with the return.

▶Windows

▶ AIX

▶ Solaris

This scroll box accepts up to 254 single byte alphanumeric characters.

▶ 400

This scroll box accepts up to 254 alphanumeric characters.

c. Click **OK** to add the comment to the return.

- To add a comment to a specific product within the return, such as details about why the customer requested a refund for one of the three products in the original order, do the following:

a. From the Products page, click **Add Remarks**. The Add Remarks dialog opens.

b. In the **Remarks** scroll box, type the comment you want to include with the product.

▶Windows

▶ AIX

▶ Solaris

This scroll box accepts up to 254 single byte alphanumeric characters.

▶ 400

This scroll box accepts up to 254 alphanumeric characters.

c. Click **OK** to add the comment about the product to the return.

7. To make other changes to this return, use the links on the left side to switch between each returns page. To save the comments and close the notebook, click **OK**.

Viewing comments added to a return

To view a comment added to an existing return, whether the comment is for a specific product within a return or for the return as a whole, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

▶ B2C

From the **Operations**menu, click **Find Returns**.

▶ B2B

From the **Sales** menu, click **Find Returns**.
A search dialog opens.

3. Search for the return that you want to work with by providing at least one of the following returns information:

- In the **Return number** field, type the return number, which uniquely identifies the return.
- In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.

- In the **Originator logon ID** field, type the following:

> B2C

The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

> B2B

The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

-

> B2B

From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.
- In the **Return status** drop-down list, select the status of the return, such as pending or canceled.
4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.
5. Depending on the type of comment you want to view, do one of the following:
- To view a comment added to the return as a whole, such as a note about why the customer requested a refund for all three products in the original order, do the following:
   a. From the list of returns, select the check box next to the return that you want to work with, and click **Summary**. A return summary displays.
   b. View the comments for the return from the **Comments** section.
   c. Click **Cancel** to close the page.
- To view a comment added to a specific product within the return, such as details about why the customer requested a refund for one of the three products in the original order, do the following:
   a. From the list of returns, select the check box next to the return that you want to work with, and click **Summary**. A summary of the return displays.
   b. Scroll down to the Remarks section to view comments to the product.
   c. Click **OK** to close the page.

Viewing a return summary

To view a summary that details a return, do the following:
1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

> B2C

From the **Operations**menu, click **Find Returns**.

From the **Sales** menu, click **Find Returns**.
A search dialog opens.

3. Search for the return that you want to work with by providing at least one of the following returns information:
   - In the **Return number** field, type the return number, which uniquely identifies the return.
   - In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
   - In the **Originator logon ID** field, type the following:

     ▶ B2C

     The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

     ▶ B2B

     The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

   -

     ▶ B2B

     From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.
   - In the **Return status** drop-down list, select the status of the return, such as pending or canceled.
4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.
5. Select the check box next to the return that you want to work with and click **Summary** to view the details of the return.
6. Click **OK** to close the page.

Printing a return summary

To print a summary that details a return, including the products to be refunded, whether or not the product needs to be returned to the fulfillment center, the return reason, credit amount, and any comments and credit adjustments, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   ▶ B2C

From the **Operations**menu, click **Find Returns**.

From the **Sales** menu, click **Find Returns**.
A search dialog opens.

3. Search for the return that you want to work with by providing at least one of the following returns information:
   - In the **Return number** field, type the return number, which uniquely identifies the return.
   - In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
   - In the **Originator logon ID** field, type the following:

     The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

     The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.
   -

     From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.
   - In the **Return status** drop-down list, select the status of the return, such as pending or canceled.
4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.
5. Select the check box next to the return that you want to work with and click **Summary** to view the details of the return.
6. Click **Print**to print the return summary.
7. Click **OK** to close the page.

Approving system-denied returns

Typically, if a customer requests a refund for a products, the return is automatically approved. However, in some cases, the return must be manually approved by someone who has authority to approve returns for the store, such as the Customer Service Supervisor. The following are possible reasons for a manual approval:

- The product needs to be physically return to the store for a refund. For example, if a CD is originally marked in the system as an item to be returned in order for the customer to receive a refund, however, the customer contacts the store to say that the CD was scratched during delivery. Rather than have the customer ship the product back to the store and reimburse shipping costs, the store may

simply ship the customer a second CD without requiring the customer to return the defective product. In this case, the Customer Service Representative can indicate, on the system, that no physical return is required and add a note about the situation. The system will deny approval for the return and the Customer Service Supervisor must manually approve this return.

- The quantity returned is more than the quantity shipped. For example, the customer orders one book, but attempts to return three.
- The credit amount requested is more than the amount paid for the original purchase. For example, the customer paid $100.00 for the order, but wants a refund for $150.00. This may be the case, if the customer's credit card payment was not deposited due to an account that was closed after authorization, but before depositing.
- The return period has expired. For example, the store may not accept returns after ten days after the original purchase.
- The system determined whether or not the returned product must be returned; however, this status was changed (such as by a Customer Service Representative).
- The store does not have an automatic approval policy. In this case, all returns must be manually approved.

To approve system-denied returns, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.
   > B2C

   From the **Operations**menu, click **Find Returns**.

   > B2B

   From the **Sales** menu, click **Find Returns**.
   A search dialog opens.

3. Search for the return that you want to work with by providing at least one of the following returns information:
   - In the **Return number** field, type the return number, which uniquely identifies the return.
   - In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
   - In the **Originator logon ID** field, type the following:

     > B2C

     The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

     > B2B

     The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM

may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

-

  > B2B

  From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.
  - In the **Return status** drop-down list, select the status of the return, such as pending or canceled.
4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.
5. Select the check box next to the return that you want to work with, and click **Approve** to approve the selected return. The Approve Returns dialog opens, listing products in returns that require manual approval, and the reason why the return was denied by the system.
6. Click **Approve** to close the dialog.

Canceling a return

To cancel a specific return, do the following:
1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > B2C

   From the **Operations**menu, click **Find Returns**.

   > B2B

   From the **Sales** menu, click **Find Returns**.
   A search dialog opens.
3. Search for the return that you want to work with by providing at least one of the following returns information:
   - In the **Return number** field, type the return number, which uniquely identifies the return.
   - In the **Order number** field, type the order number that contains the product to be returned, which uniquely identifies the order.
   - In the **Originator logon ID** field, type the following:

     > B2C

     The store logon ID for the customer <span class="b2b">who originated the return. <span> If this search dialog was launched by clicking **Find Returns**from the Return History list for a particular customer, the customer logon ID is populated with the customer's logon ID for the store.

     > B2B

     The logon ID for the person who originated the return. Depending on the access control policies implemented, another individual may have the authority to change or request changes to the return. This individual is not the originator of the return, but may need to specify the originator logon ID when requesting an update at the store. For example, if an employee of IBM

may create the original return, but the employee's manager may contact the store to change the return. To locate this return, the store may request the originator's logon ID.

- From the **Contract name** drop-down list, select the name of the contract. A contract stipulates the terms for the customer to shop at the store.
- In the **Return status** drop-down list, select the status of the return, such as pending or canceled.

4. Click **Find**. The system performs a search and a list of returns that match the search criteria displays.
5. Select the check box next to the return that you want to work with and click **Cancel**.
6. A confirmation message displays, indicating that the return will be canceled. Click **OK** to cancel the return.

Customer Care

System requirements for the customer care workspace

The system requirements for the customer care workspace are described below.

General requirements
- **Processor:** Pentium II 450 MHz or higher
- **Operating Systems:** Windows NT Workstation 4.0 with Service Pack 5, Windows 2000 Professional
- **RAM:**RAM requirements depend on your operating system.
  - 512 MB RAM or higher for Windows 2000 Professional or Windows NT Workstation 4.0 with Service Pack 5

Software requirements
- **Browser:** Microsoft Internet Explorer 5.5 with Service Pack 1.

Searching and browsing the Sametime directory

The Sametime directory lists the names of all the people in your organization. Your administrator maintains the directory. You might need to access the directory when you add names to the buddy list, or the Who Can See If I Am Online list.

Follow these steps to search and browse the directory:
1. From the Add Coworker or Add to Privacy List dialog box, click **Directory**. An "Add to Invitation List" dialog box displays.
2. Select a Directory from the drop-down list.
3. Enter as much of the name as you can and click **Search**.
4. A list of matching names displays. Select the correct name from the list and click **Add**.
5. Click **Close**.

Tip: If you do not find the name the first time you search for it, try entering the name in different ways. For example, try entering the last name only, the last name and the first name, or the first name and then the last name. Search results might vary depending on how your administrator organizes your directory.

Getting started

Making your browser compatible for customer care

To make your browser work with the customer care workspace, do the following:

- Ensure that your browser meets the <u>system requirements</u>.
- Ensure that the following options are enabled in your browser's preferences:
  - Java and JavaScript
  - Microsoft ActiveX Controls (Internet Explorer only)
  - Java Plug-in for Netscape
  - SmartUpdate (Netscape only)
- Set your browser to accept cookies if your Web site uses them.
- You might need to configure your browser to use a proxy server. If so, obtain the server name and port number from your Site Administrator, and then set up your browser to use the proxy server. Consult your Site Administrator before changing any proxy settings.

Logging on to the customer care workspace

You must log on to access the customer care workspace. To log on, do the following:

1. Open your Web browser and enter the Web address (URL) for the Websphere Commerce Accelerator. You can obtain this address from your administrator. You may receive a security warnings, a Security alert regarding a security certificate for the site. You will need to accept it.

   - Enter your WebSphere Commerce Accelerator logon username and password.
   - Click **Log On** to the WebSphere Commerce Accelerator using the user name and password specified.

2. On the next page, select a store name and a language and click **OK**.
Select **Store Information**:
Use this page to select the store and language you want to work with using the WebSphere Commerce
Accelerator. Depending on your role, you can also specify the fulfillment center associated with
the store. Each WebSphere Commerce Accelerator logon session is store specific. At any time, if you
wish to change your store, language, or fulfillment center selection, click the icon, found in the
upper left corner to display the selection dialog. All fields on this page are mandatory.

   Note: If only one store, one language, and no fulfillment center is defined, then this page does not
display. You can go directly from the WebSphere Commerce Accelerator logon page to the home page.

3. The next page is the home page of the WebSphere Commerce Accelerator.

   -

     > B2C

     From the **Operations** menu, select **Customer Care**.

   -

     > B2B

From the **Sales** menu, select **Customer Care**.

Note: Accept any security warnings that you receive. See handling security warnings for more information.

Handling security warnings

Security warnings display whenever you log on to the customer care workspace. To access the workspace, you must accept these warnings.

The text of the warnings depends on your browser. For Microsoft Internet Explorer 5.5, the the **Security Alert**dialog displays. Click **Yes**. If you are prompted to accept any cookies, click **Yes** or **OK** to accept them.

Exiting the customer care workspace

To leave the customer care workspace, close the window. You can accomplish this in two ways.
- Clicking the **X**in the upper right hand corner window.
- Clicking the window icon in the upper left corner and select **Close** from the drop-down menu.

Modifications that can be done by the administrator

Your administrator can customize the customer care workspace to meet your company's specific needs. The following table summarizes the changes your administrator can make:

Feature	Possible changes
Monitoring tab	Specify the different views available for monitoring. These are: **Customer waiting**, **All Store Customers** or both. In addition determine the display format for shopping cart information and the contents of customer profiles. Determine the ability of a Customer Service Representative to initiate help to a customer.
Customer profiles	Determine the ability to view customer profiles. Depending on the capabilities of your Web site, your administrator might choose not to display customer profiles.
Shopping carts	Determine the ability to view customers' shopping carts. Depending on the capabilities of your Web site, your administrator might choose not to display customers' shopping carts.
Session	Specify a limit for the number of customers one Customer Service Representative can assist at one time.
Proxy Server	Require you to use a proxy server to access the customer care workspace. See your administrator for information about proxy server settings.

Viewing customer information

Monitoring customer activity at the Web site

The Monitoring tab displays information that helps you gauge the level of customer activity at your Web site. You can also view details about specific customers and start sessions from the **Monitoring** tab.

Click the **Monitoring** tab to display the following:

- A list of customers currently waiting for help, or visiting the Web site or both.
- The customers currently in active sessions with customer service representatives.
- The number of customers currently waiting for help from a customer service representative.
- The shopping carts and profiles of individual customers.
- The amount of time a customer has spent at the Web site.
- The Web page a customer is currently viewing and the amount of time the customer has spent on that Web page.
- The number of items in the shopping cart.

Monitoring customers waiting for help

The number of customers currently waiting for help from customer service representatives is displayed below the **Customer waiting** indicator. The number increases when a customer clicks the help link on your Web site. The number decreases when:

- A customer service representative begins a session with a customer.
- A customer closes a request for help before being contacted by a Customer Service Representative.

Tip: The **Customer waiting** indicator number contains only customers who are waiting for help from a customer service representative. The list of all store customers in the Web site contains all customers at the site, including customers under the **Customer waiting** indicator, customers in active help sessions, and customers who have not requested help. The list of customers waiting only includes the customers waiting for help.

Viewing the list of customers at the Web site

The **Monitoring** tab displays a list of customers who are currently visiting the Web site under the "All store customer" heading.

Customer status is indicated to the left of the customer name:

- **Waiting:** The customer has requested help and is waiting for help.
- **Chatting:** The customer is currently in a session with a customer service representative.
- **Thinking:** The CSR has initiated a help session with a customer and is waiting for the customer to respond.

The following table describes the information included in the list of customers:

Customer	Displays the customer's user name if the customer has signed in. If the customer has not signed in, the customer is displayed as a guest with an assigned guest ID.
InSite	Displays the amount of time the customer has spent at the Web site. Because the In Site timer resets each time you log on to the Customer Care workspace, it might not accurately reflect the time a customer has spent at the Web site. For example, a customer might spend 5 minutes at the Web site before you log on. The In Site timer does not include the five minutes prior to your logging on.

Current Page	Displays the title of the Web page the customer is currently viewing.
In Page	Displays the amount of time the customer has spent on the current Web page. Because the In Page timer resets each time you log on to the customer care workspace, it might not accurately reflect the time a customer has spent on a Web page. For example, a customer might spend 5 minutes on a Web page before you log on. The In Page timer does not include the five minutes prior to your log on.
Cart	This number reflects the number of items in the customer's shopping cart.

Tip: The **All store customer** list contains all customers at the site, including customers waiting for help and those in active sessions with agents. The **customers waiting** number contains only those customers who are waiting for help from a customer service representative.

Viewing a customer profile for customer care

The customer profile can contain the customer's ID, order history and address. Your administrator determines the exact content of customer profiles.

To view a customer profile:

- **From the Monitoring tab:** Select the customer's name in the list and click **Profile**. The customer profile displays in a new browser window on your screen.
- **From the Session tab:** During a session with a customer, click **Profile**. The customer profile displays in a separate browser window on your screen.

Note: Customers who have not registered or logged on to your Web site have incomplete profiles. You might need to ask a customer to register and log on to your Web site if you want to view a complete profile.

Viewing the shopping cart contents

If a customer has a shopping cart, you can view the cart's contents in a separate browser window on your screen. Your administrator determines the format and exact contents of the shopping cart information.

To view a customer's shopping cart, do the following:

- **From the Monitoring tab:** Select the customer's name from the list and click **Shopping Cart**. The shopping cart appears in a new browser window.
- **From the Session tab:** During an active session, click **Shopping Cart**. The shopping cart appears in a new browser window.

Initiating a chat with a customer at the Web site

Sometimes you may want to contact a customer even if the customer has not asked for help. For example, if the Monitoring tab shows that a particular customer has spent several minutes on the checkout Web page, you might want to contact the customer and offer your assistance.

You can initiate contact with the customer by sending a chat message to ask if the customer needs assistance. At this time, the customer status changes to "thinking." A session begins when the customer responds by clicking **Yes**. If the customer responded by clicking **No**, the customer status returns to a blank.

To contact a customer who has not requested help:

1. Make sure you are on the **Monitoring** tab.
2. Select the customer's name in the All store customer list.
3. Click the **chat** button beneath the list of customer names. A small chat window displays on your screen.
4. Type a message and click **Send** or press **Enter**. A window with an explanatory message appears on the customer's computer screen.
   - If the customer decides to join the session with you, your name and chat message appear in the customer's chat window. A session begins in your Session tab. Proceed to Step 5.
   - If the customer does not respond or decides not to join the session, you will not be able to engage in a chat session with the customer.
5. Click the **Session** tab to continue the session.

Communicating with customers

Starting a help session
A session is any communication between you and a customer. A session can be a simple exchange of typed messages, or it can include several tools that allow you to collaborate with the customer. The information you exchange during sessions is encrypted for security.

You can start a session in two ways:
- Clicking on the serve next button
- Initiating a chat with a customers at the Web site

Participating in a help session
Once you enter a session, information about the customer displays along the top of your screen. See Viewing the list of customers at the Web site for a description of this information. A tab containing the customer's name and a timer also appears. The timer tracks the amount of time spent in the session.

You can use several tools to communicate with customers during sessions. The table below briefly describes the tools available during sessions.

Tool	Purpose	Use this tool if...
Chat	Allows you to send typed messages to communicate instantly with customers.	The customer requires minimal assistance. The customer wants to send you a hyperlink.
View Customer Page	Provides an instant "snapshot" of the customer's Web page. (You do not see any information that the customer enters on the page.)	You need a quick look at what the customer sees on the Web page. You do not need to make changes to the information on the Web page.
Send Page	Sends a Web page to the customer's browser.	You want to show the customer a specific Web page.

Chatting with customers
Once you are in a session, you can use chat messages to exchange typed communication with customers. Both you and the customer see a transcript of the messages for the duration of your session. The button containing the customer's name, session status and the session clock.

For the session that is currently active, the status changes to active and the background is white.

For sessions that are not active, (the sessions that are hidden in the background) you can still watch the session button that is displayed across the top panel. The color will change, depending on the status.

- **Blue (Waiting status)**: The customer was the last person to send a message. A blue button alerts you that a customer is waiting for you to respond.
- **Gray (Thinking status)**: The CSR was the last person to send a message. The customer has not responded yet.

Sending a chat message to a customer

1. To send a chat message to a customer, use the **Session** tab.
2. Position your cursor in the box beneath **Type your text**. Type your message.
3. Click **Send** or press **Enter**. Your message displays in the chat transcript area.

Tip: Full Web addresses are converted to hyperlinks in the chat transcript area. You must include the protocol (usually "http://" or "ftp://") and "www" at the beginning of the address to send a hyperlink in a chat message.

Viewing a customer's Web page

Sometimes the best way to understand a problem that a customer is encountering is to look at what the customer sees on a Web page. When you view a customer's Web page, a new browser window displays on your screen. This window displays a "snapshot" of the Web page the customer is currently visiting. However, you will not be able to see:

- Any information the customer has entered on the Web page. For example, if the customer fills out a form, you see only a blank form when you view the customer's Web page.
- Changes the customer makes to the Web page while you are viewing it.
- When the customer moves to another Web page.

Your view of the Web page might be slightly different from the customer's view if:

- The customer uses a different Web browser than you do.
- You or the customer have personalized your browser settings. For example, if a customer's browser is customized to display text in a larger size, the customer sees less information on the screen than you do if you have accepted the default text size for your browser.
- There is personalized content in the Web page. For example, if the customer has been presented with a product recommendation generated by a targeted marketing campaign, you will not be able to see that product recommendation.

Viewing a customer's page during a session

You can view a customer's page during a session with the customer.

1. Click **View Customer Page**. A new browser window displays on your screen.
2. If necessary, resize the new browser window so it does not obscure the chat transcript area. See managing multiple customer care windows for more advice about using multiple windows during a session.

Stop viewing a customer's page

You can stop viewing the customer's Web page in one of three ways:

- Click the **X** in the upper right corner of the window containing the customer's Web page.

- Choose **File - Close** in the window containing the customer's Web page.
- If you have minimized the window containing the customer's Web page, you can right-click on the window in the task bar along the bottom of your screen, and then choose **Close**.

Sending Web pages

During a session, you can automatically direct a customer's browser to a specific Web page. For example, if a customer cannot find the Web page that describes a particular product, you can redirect the customer's browser to the correct Web page. The customer sees the new page in their original browser window.

To send a Web page to a customer, do the following:

1. Make sure you are on the **Session** tab.
2. Using chat message, inform the customer that you would like to direct the customer's browser to a different Web page. Explain that the customer should not touch the keyboard or mouse during the process and that no new windows will open.
3. Click **Send Page**. The Send Page dialog box displays on your screen.
4. Type a Web page address or copy and paste a Web page address.
5. Click **Send to Browser**. The Send Web Page dialog automatically closes. The customer's browser displays the new Web page.

Note: If your Web site uses frames, part of your Web site will remain visible to the customer even when you send a page that is outside your Web site. Frames also prevents the customer from seeing the address of the Web pages you send.

Ending a help session

To end a session with a customer, click **End Chat**.

The customer receives a message explaining that you have ended the session. The session window remains on the customer's screen until the customer manually closes it.

Note: You are not notified when a customer ends a session. If you are in a session with a customer and the Session tab suddenly goes blank, the customer might have accidentally closed the session. You can try to contact the customer and resume the session from the **Monitoring** tab.

Managing multiple customer care windows

Use these tips to help manage the multiple windows that display on your screen during a session. You might also want to share these tips with customers.

- **Participate in one session at a time.** Tracking multiple sessions can be difficult, especially when you use tools that require separate windows. In most cases, you can best serve your customers by participating in only one session at a time. If you must conduct multiple sessions, first read Managing multiple customer care sessions.
- **When you are done with a tool, be sure to close the tool window instead of minimizing it.** You close a tool window by clicking the **X** in the upper right corner of the window. Clicking the line (**_**) minimizes the window, leaving it accessible from the task bar along the bottom of your screen. (You might need to move or resize the tool window to keep the buttons visible.)
- **Keep the chat transcript area visible.** Whenever possible, keep the chat transcript area visible by moving or resizing other windows.

- **Resize windows.** Making a tool window smaller might allow you to view both the tool window and the chat transcript area. You can resize any window by placing your cursor along the bottom or side edge of the window until the cursor becomes a double-arrow. Make the window bigger or smaller by dragging the cursor. You might need to resize *both* the tool window *and* the window containing the **Sessions** tab, so that you can enter chat messages and view the chat transcript while also viewing the tool window.
- **Move windows.** You can move a window by placing your cursor along the title bar at the top of the window until the cursor becomes a double arrow. Drag the window and drop it anywhere on the screen.
- **Tell customers when their browser window will change**. Always tell customers when their browse window will change on their screen. You should also tell customers if they need to manually close a window. For example, when a new Web page has been sent to a customer's screen, they should be told in advance.
- **Switch between windows when necessary.** Some windows will not remain on your screen side by side. Use the taskbar along the bottom of your screen to switch between windows.

Managing multiple customer care sessions

In most cases you can best serve your customers by conducting only one session at a time. If you must participate in multiple sessions, follow the guidelines below.

- **Watch for blue session buttons.** When you participate in multiple sessions, a series of session buttons containing each customer's name, the session status and a session timer displays across the top of your screen. A session button turns blue when a customer is waiting for you to respond to a chat message.

Communicating with coworkers

Communicating with coworkers

The customer care workspace allows you to send a message to everyone currently logged on in a public chat, as well as send a message to specific coworkers in a private chat. It also allows you to establish a buddy list composed of coworkers you chat with frequently.

You communicate with your coworkers online by:
- Setting up your online status
- Chatting with coworkers

You manage your buddy list by:
- Setting up your buddy list
- Adding names to the buddy list
- Removing names from the buddy list

Setting up your buddy list

You can chat with the people in your buddy list. The list contains names you added from your company's directory. (The Sametime directory lists everyone in your organization. Your administrator maintains the directory.)

At any time when you are logged on to the customer care workspace, you can create your buddy list by adding names to the list as follows:
- Adding names to the buddy list
- Removing names from the buddy list

• Determining who can see you online

Setting up your online status

You can set up your online status in either the coworker view or the buddy list dialog box.

This online status applies only to the coworker function, and does not affect your ability to assist customers.

You can change your online status at any time by selecting a status from the drop-down menu above the coworker chat transcript or the buddy list. The table below describes the online status options.

Online status	Details
Active	Logged on Can send and receive messages and participate in instant meetings
Away	Logged on, but not using the computer right now Can receive messages and display them on the screen until the person returns
Do Not Disturb Me	Logged on, but does not want to receive messages or participate in conference chats

Adding names to the buddy list

Each time you log on to the customer care workspace, you may create your buddy list. You can add and delete names to the buddy list at any time. You may also add your own name to the buddy list.

To add a name to the buddy list:

1. Click on the **View** menu.
2. Select the **Buddy List** menu item. The Buddy List dialog box appears.
3. Click **Add Buddy**. The Add user dialog box appears.
4. Enter the coworker's name or group name as it appears in your company's directory. (If you do not know how to spell a name, or if you are unsure how the name appears in the directory, you can search and browse the directory).
5. Click **Add**.
6. Click **Close**.

Tip: Your directory may also contain groups. Each group contains several names. When you add a group, all of the names within that group are added to your buddy list. To verify the names contained within a group, select the group and click **Properties** in the **Add to Invitation List** dialog box.

Removing names from the buddy list

You can remove names from your buddy list at any time. Once you remove a name, you can add the name again at any time.

To remove a name from your buddy list:

1. Open the Buddy List interface by going to **View** menu.
2. Select **Buddy List**.
3. Select the name.
4. Click on the **right mouse button** and select **Remove**.

Determining who can view your online status

The customer care workspace includes a privacy feature that allows you to determine which coworkers can see your name in their buddy list.

Note: If you prevent a coworker from viewing your online status, you cannot see that coworker's name in your buddy list.

To determine which coworkers can see you online, do the following:

1. From the View menu, click **Buddy List**. The "Buddy list" dialog box will display.
2. Click **Who Can See Me**.
3. Select one of the options:
   - **Everybody can see if I am online**: Anyone who adds you to their buddy list can see you.
   - **ONLY list below**: Only the specified people can see you.
   - **Everybody EXCEPT list below**: The specified people cannot see you, but anyone else who adds you to their buddy list can see you.
4. If you selected "**ONLY list below**" or "**Everybody EXCEPT list below**," you must add names to the **Who Can See If I Am Online** list:
   - Type a name as it appears in your company's directory.
   - Click **Add**.
   - Repeat this process if you need to add additional names.
   - Click **Close**.
5. Click **OK**.

Removing people from the Who Can See If I am Online list

To remove coworkers from the Who Can See If I Am Online list:

1. From the buddy list, click **Who Can See Me**.
2. When "Only list below" is selected, select a name from the list and click **Remove**.
3. Repeat Step 2 until you have removed all of the appropriate names.
4. Click **OK**.

Note: If you remove all names from the list, you must select "**Everybody can see if I am online**" before clicking **OK**.

Chatting with coworkers

You and your coworkers can chat by exchanging messages with each other. While you are chatting, you see a transcript of your chat messages in the chat window.

Sending chat messages to everyone logged on

Follow these steps to send a chat message to everyone logged on:

1. Enter your message in the input field at the bottom of the coworker view.
2. Click **Send** or press **Enter**. A chat window containing your message displays on the screens of all coworkers currently logged on.

Sending chat messages to specific coworkers

Follow these steps to send a chat message to a specific coworker:

1. Do one of the following:
   - Right-click on a name in the coworkers list and choose **Chat**.
   - Double-click on a name in the coworkers list.
   - Select a name from the coworkers list, and then click the **Chat** button below the coworkers list.
2. Enter your message.
3. Click **Send** or press **Enter**. A chat window containing your message appears on the coworker's screen.

Tip: Full Web addresses are converted to hyperlinks in the chat transcript area. You must include the protocol (usually "http://" or "ftp://") and "www" at the beginning of the address to send a hyperlink in a chat message.

Ending a chat session

To end a chat session with a coworker, click the **X** in the upper right of the chat window or **Close**.

Inviting other coworkers to join a chat

Follow these steps to invite other coworkers to a chat:

1. Click **Invite Others**.
2. (Optional) Edit the topic or the invitation message.
3. Click **Add Invitees**.
4. Type a name as it appears in your coworkers list or your company's directory.
5. Click **Add**.
6. Repeat Step 4 until you have added all of the appropriate names to the invitation.
7. Click **Send**. The invitation displays on your coworkers' screens.

Responding to a coworker's invitation

If a coworker invites you to a chat, you can either respond privately, join the meeting, or decline the invitation.

- To respond privately, click **Respond**. This step starts a private chat with the person who sent the invitation. The invitation remains on the screen. You can join the meeting at any time.
- To accept the invitation, click **Join**.
- To decline and close the invitation, click **Close**.

Auctions

Withdrawing a participant's bid

To withdraw a participant's bid, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   ▶ B2C

   From the **Merchandise** menu, click **Auctions**.

   ▶ B2B

   From the **Products** menu, click **Auctions.**

3. The Auctions page displays. Click **Bids**.

4. The Bids page displays. Select the bid or bids you want to withdraw and click **Withdraw**. The list refreshes.

Responding to a discussion forum message

To respond to a discussion forum message, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

> B2C

From the **Operations** menu, click **Auctions**.

> B2B

From the **Sales** menu, click **Auctions**.

3. The Auctions page displays. Select an auction and click **Discussion** to manage discussions about auctions.

4. The Auction Discussion page displays. Select a message and click **Respond**.

5. The Respond Discussion Forum Message page displays. Type a subject or leave the existing subject in place. Type the text of your message and click **OK**. The list of forum messages refreshes. Note that your message is automatically made public.

Deleting a discussion forum message

To delete a discussion forum message, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

> B2C

From the **Operations** menu, click **Auctions**.

> B2B

From the **Sales** menu, click **Auctions**.

3. The Auctions page displays. Select an auction and click **Discussion** to manage discussions about auctions.

4. The Auction Discussion page displays. Select a message and click **Delete**.

5. A message asks if you want to delete the message. Click **OK**. The list refreshes.

Chapter 5. Customer Service Supervisor

Auctions

Viewing auctions

To view a list of auctions, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

   > B2C

   From the **Merchandise** menu, click **Auctions**.

   > B2B

   From the **Products** menu, click Auctions.

3. The Auctions page displays. From this list you may do the following:

- Create an auction using the Auction wizard
- Display auction summaries
- Retract an auction
- Manage discussions
- Manage bids
- Close an auction
- Change existing auctions
- Search for auctions

Searching for auctions

To search for auctions by SKU, auction ID, or auction type, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

   > B2C

   From the **Merchandise** menu, click **Find Auction**.

   > B2B

   From the **Products** menu, click **Find Auction**.

3. A search page displays. Specify the SKU or auction ID, or select an auction type and click **OK**. The Auctions page displays a list of auctions that match the criteria you specified.

Displaying auction summaries

To display summary information about an auction, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

   > B2B

From the **Products** menu, click Auctions.

> B2C

From the **Merchandise** menu, click **Auctions**.

3. The Auctions page displays. Select an auction and click **Summary**. The following information displays:
   - Auction ID
   - Auction type
   - Auction status
   - SKU
   - Product name
   - Product short description
   - Rule template
   - Product template
   - Offered price (Dutch auctions)
   - Bid rule name (Open Cry or Sealed Bid auctions)
   - Currency
   - Quantity
   - Reserve price
   - Deposit
   - Start date
   - End date
   - Short description

   Click **Help** for more information about these items.

Changing existing auctions

To change existing auctions, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

2.

> B2C

From the **Merchandise** menu, click **Auctions**.

> B2B

From the **Products** menu, click **Auctions**.

3. The Auctions page displays. Select an auction and click **Change**. The Auction notebook starts. Note that the changes you can make depend on the auction state (as shown in the Auctions page). For example, you can change any field in an auction that is in the Future state, but only certain fields for auctions that are in the Current state.

   For current auctions, you may make the following changes only:
   - Postpone the end date or time
   - Increase the quantity
   - The offered price for Dutch auctions

   For future auctions, you can change all parameters.

4. To change an auction, complete each page and click **Next** on the navigation panel until you are finished. Online help is available for each page. When you are done and click **OK**, a message displays.

Closing bidding for an auction

To close bidding for an auction, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > B2C

   From the **Merchandise** menu, click **Auctions**.

   > B2B

   From the **Products** menu, click **Auctions**.
3. Click **Close** to close bidding for an auction. The page refreshes to display a status of Bidding Closed for the selected auctions. No further bids can be submitted.

Retracting an auction

To retract an auction, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > B2C

   From the **Merchandise** menu, click **Auctions**.

   > B2B

   From the **Products** menu, click **Auctions**.
3. The Auctions page displays. Select an auction and click **Retract** to cancel the auction. When an auction is retracted, all bids are withdrawn. The page refreshes to display a status of Retracted for the auction you selected.

Managing bids

To manage bidding, you may do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > B2C

   From the **Merchandise** menu, click **Auctions**.

   > B2B

   From the **Products** menu, click Auctions.
3. The Auctions page displays. Click **Bids**.
4. The Bids page displays. Select the bid or bids and click **Withdraw**. The list refreshes. From the Bids page you can withdraw any bid.

Managing discussions

To manage discussions, use the Discussion Forum page as follows:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2.

   > B2C

   From the **Merchandise** menu, click **Auctions**.

   > B2B

   From the **Products** menu, click **Auctions**.
3. The Auctions page displays. Select an auction and click **Discussion** to manage discussions about the auction.
4. The Auction Discussion page displays. From this page you can do the following:
   - Create new messages
   - Respond to messages
   - Change the status of a customer's message from private to public
   - View messages
   - Delete messages

Request for Quotes (RFQs)

Viewing the RFQ List (Business Edition)

Your RFQ List is displayed on the RFQ request home page when you logon.
1. Log on to the Store.
2. Click **RFQs**.
3. The RFQ request home page displays.

The RFQ List is located on this page.

If you are already logged on, click the **Home** link in the history in the upper right of the RFQ request pages to return to the RFQ request home page.

In the RFQ List, all RFQs are listed by name (default). You can also sort the list of RFQs by:
1. Status
2. Creation Date
3. Submission Date
4. Closing Date

To sort the list, click the arrow next to the desired heading name.

By default, the RFQ List shows all RFQs. You can limit the RFQ List to show only RFQs of a certain state by selecting a status from the **View** list. The choices for viewing by status are:
- Draft
  The RFQ can still be modified before submittal to the seller.
- Active
  The RFQ request has been submitted to the seller and is awaiting their response.

- Canceled

  The buyer has decided that they no longer want the product or service originally requested.

- Closed

  The time period during which responses can be accepted has expired. Responses are now being evaluated by the buyer.

- Complete

  The winning responses have entered the order or contract process as pre-determined by the buyer.

- Future

  The RFQ is active and the buyer will start accepting responses on the specified start date.

To work on an RFQ in the RFQ list, select the check box for the desired RFQ and click one of the buttons to the right of the RFQ List.

Checking the status of approval requests (Business Edition)

Submitters and administrators with the appropriate access, can view approval requests and verify the status of their associated approval decisions. To check the status of an approval request you are reviewing, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Click **Store > Approvals Requests.** The Approval Requests page displays.
3. The Status column indicates whether the request status is pending, approved or rejected.

Administrators can also view this page through the administrator console.

Appendix A. Opening the WebSphere Commerce Accelerator

To open the WebSphere Commerce Accelerator, do the following:

1. Ensure that you are using a machine with Microsoft Internet Explorer 5.5 or above installed (The recommended browser version is 5.5). You cannot display the WebSphere Commerce Accelerator on earlier version of Internet Explorer or other browsers.

2. Ensure that the WebSphere Commerce instance is started. You can start the instance using the WebSphere Application Server Administrator's Console.

3. The WebSphere Commerce Accelerator supports the default Internet Explorer browser settings. If you have altered your settings, or to verify your settings, select the **Tools** menu, then **Internet Options**. The Internet Options dialog opens. Ensure that the following settings are configured:

   - Set fonts as follows:
     a. From the **General** tab, click **Fonts**. The **Fonts** dialog opens.
     b. From the **Language script** drop-down list, select **Latin based**.
     c. From the **Web page font** drop-down list, select **Times New Roman**.
     d. From the **Plain text font** drop-down list, select **Courier New**.
     e. Click **OK**. Other fonts and font sizes may affect the layout of the WebSphere Commerce Accelerator forms on your screen.

   - Enable caching as follows:
     a. From the **General** tab, under **Temporary Internet files**, click **Settings**. The **Settings** dialog opens.
     b. Under **Check for newer versions of stored pages**, select **Automatically**.
     c. Ensure that the amount of disk space to use for caching is set to a value greater than zero.
     d. Click **OK**.

4. For optimal results, make the following computer setting adjustments:
   - Set your screen resolution to at least 800 x 600 pixels; 1024 x 768 pixels is recommended.
   - Set your monitor's color palette to 256 or more colors.
   - Set your Windows desktop display   font size to small fonts.

   ▶Windows

   From a Windows machine, to work with your computer settings, click **Start**, **Control Panel**, **Display**, then the **Settings** tab and do the following:
   - In the **Desktop Area** box, ensure that the screen resolution at least 800 x 600 pixels; 1024 x 768 pixels is recommended.
   - From the **Color Palette** drop-down list, select 256 or more colors.
   - From the **Font Size** drop-down list, select **Small fonts**.

5. Maximize your browser window.

6. Start the WebSphere Commerce Accelerator by doing one of the following:
   -

     ▶Windows

On the machine where WebSphere Commerce is installed, click **Start**, **Programs**, **IBM WebSphere Commerce**, then **WebSphere Commerce Accelerator**.

-

▶Windows

▶ AIX

▶ Solaris

On the machine where WebSphere Commerce is installed, or on a client machine on the same network as the WebSphere Commerce machine, access the following Web address in your browser: `https://host_name:8000/accelerator` where *host_name* is the fully qualified HTTP host name of your WebSphere Commerce Server.

7. Log onto the WebSphere Commerce Accelerator as follows:

   a. From the Logon page, type your WebSphere Commerce Accelerator logon user name and password.

   b. Initially, the user name and password are both set to `wcsadmin`. If this is the first time you are logging onto the WebSphere Commerce Accelerator as the default ID and password of `wcsadmin`, the Change Password page displays, prompting you to change this password. Do the following:

      1) In the **Old Password** field, type your current WebSphere Commerce Accelerator logon password.

         ▶Windows

         ▶ AIX

         ▶ Solaris

         This field accepts up to 128 single byte alphanumeric characters.

         ▶ 400

         This field accepts up to 128 alphanumeric characters.

      2) In the **New Password** field, type a new logon password.

         ▶Windows

         ▶ AIX

         ▶ Solaris

         This field accepts up to 128 single byte alphanumeric characters.

         ▶ 400

         This field accepts up to 128 alphanumeric characters.

      3) In the **Password confirmation** field, re-type the password.

      4) Click **Change** to save the new password. The Select Store Information page displays.
         Note: If only one store, one language, and no fulfillment center is defined, then the Select Store Information page does display. You can go directly from the WebSphere Commerce Accelerator logon page to the home page, and you do not have to complete steps 7 c to f.

   c. From the **Name** drop-down list on the Select Store Information page, select the name of the store. If you are authorized to work with a single store, the store name is pre-selected.

d. From the **Language** drop-down list, select the language in which you want to administer the store. If you are authorized to work with a single language, the language is pre-selected.

e. If you are assigned a role with fulfillment duties, from the **Fulfillment center** drop-down list, select the name of the fulfillment center associated with the store.

f. Click **OK**. The WebSphere Commerce Accelerator home page displays. Depending on your user role, one or more menus display.

Notes:

- Do not click the **Refresh** or **Back** buttons in the browser while using the WebSphere Commerce Accelerator. If you reload the window after you have entered some data, data will be lost.

- Once you have completed your WebSphere Commerce Accelerator tasks, you should log out of the WebSphere Commerce Accelerator so that the session expires, rather than simply closing the browser. To log out, click **Logout** from the history, which is displayed in the upper right of the WebSphere Commerce Accelerator. When you log out, your SSL cookie is dropped and you no longer have secure access to the WebSphere Commerce Accelerator. This is especially important if the WebSphere Commerce Accelerator will be used by multiple users on a single machine with different authorities since logging out prevents unauthorized access.

Appendix B. Learning Guides

Sales Manager Learning Guide (Business Edition)

> Business

The Sales Manager creates accounts, create and approves contracts, and handles RFQs. In addition the Sales Manager can also perform all tasks assigned to the Account Representative, Customer Service Supervisor and Customer Service Representative roles.

Learning objectives:
Learn how to use WebSphere Commerce Accelerator to perform Sales Manager tasks. You will learn how to:

- Create a new business account
- Approve or reject a draft contract
- Create return reasons
- Specify personalized attributes
- Manage RFQs

Prerequisite skills:
You should understand store procedures and how to use a Web browser.

Getting Started:
From the navigation frame click **Roles -> Business relationship management -> Sales Manager**.
You will see a list of applicable online help topics.

Account Representative Learning Guide (Business Edition)

> Business

The Account Representative role is the primary role responsible for creating contracts for accounts, changing orders for accounts, and monitoring account activity. Account Representatives are part of the sales organization, and as such may be involved in the creation of targeted sales promotions such as discounts and coupons.

Learning objectives:
Learn how to manage contracts and accounts using the WebSphere Commerce Accelerator. You will learn how to:

- Manage accounts
- Manage contracts
- Manage account-related marketing activities

Prerequisite skills:
You should understand store procedures and how to use a Web browser.

Getting Started:
From the navigation frame click **Roles -> Business relationship management ->**

Account Representative.
You will see a list of applicable online help topics.

Customer Service Representative Learning Guide

Learning objectives:
Learn how to change customer information using the WebSphere Commerce Accelerator. You will learn how to:

- Create, change, or cancel a customer order
- Change customer registration information
- Reset a customer account
- Process a return
- Manage auctions for customers, such as withdrawing bids and managing discussion forums

Prerequisite skills:
You should understand store procedures and how to use a Web browser.

Getting Started:
From the navigation frame click **Roles -> Business relationship management -> Customer Service Representative**.
You will see a list of applicable online help topics.

Customer Service Supervisor Learning Guide

Learning objectives:
Learn how to approve returns, and handle payment exceptions. In addition the Customer Service Supervisor can perform all the tasks assigned to a Customer Service Representative to learn about these tasks refer to the Customer Service Representative Learning Guide.

- View Accounts
- Viewing RFQs
- Manage customer information
- Approve system-denied returns
- Manage auctions
- Process payments

Prerequisite skills:
You should understand store procedures and how to use a Web browser.

Getting Started:
From the navigation frame click **Roles -> Business relationship management -> Customer Service Supervisor**.
You will see a list of applicable online help topics.

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