IBM WebSphere Commerce

IBM

Logistics and Operations: Online Help Files

Version 5.4

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Version 54

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Chapter 1. Logistics and operations management roles

WebSphere Commerce supports the following logistics and operations management roles:

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- Returns Administrator (page 2)
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Logistics Manager

The Logistics Manager, sometimes called the Shipping Manager, manages and negotiates bulk freight/shipping from carriers to warehouse, and to individual customers. This role is responsible for ensuring the company uses the best shippers at the best costs to meet company strategy. Shipping is an important aspect of customer service and may be a key success factor for the online business.

- Performs all Pick Packer tasks
- Performs all Receiver tasks
- Performs all Returns Administrator tasks
- Lists fulfillment centers
- Creates new fulfillment centers
- Views and changes information for the fulfillment center
- Deletes fulfillment centers
- Lists return reasons
- Creates new return reasons
- Views and changes return reason information
- Deletes return reasons
- Finds orders
- Finds returns
- Views order management reports
- Views the inventory report
- Creates new expected inventory records
- Views and changes expected inventory records
- Shows details of received goods for selected expected inventory records
- Deletes expected inventory records
- Closes expected inventory records

Operations Manager

This role manages order processing, ensuring that orders are properly fulfilled, payment is received, and orders are shipped. The Operations Manager can search for customer orders, view details, manage order information, and create and edit returns.

- Performs all B2C - Customer Service Supervisor tasks
- Performs all Pick Packer tasks

- Performs all Receiver tasks
- Performs all Returns Administrator tasks
- Lists fulfillment centers
- Creates new fulfillment centers
- Views and changes information for the fulfillment center
- Deletes the selected fulfillment centers
- Lists return reasons
- Creates new return reasons
- Views and changes return reason information
- Deletes return reasons
- Views business intelligence reports
- Views order management reports
- Views inventory reports
- Creates new expected inventory records
- Views and changes expected inventory records
- Shows details of received goods for selected expected inventory records
- Deletes expected inventory records
- Closes expected inventory records

Receiver

The Receiver receives inventory at the fulfillment center, tracks expected inventory records and ad hoc receipts for ordered products, and receives returned products as a result of customer returns.
- Lists expected inventory
- List details of the expected inventory record
- Receives inventory for a selected and expected inventory record
- Displays receipts
- Finds inventory
- Creates ad hoc receipts for SKUs (stock keeping units) in inventory
- Adjusts quantities for SKUs in inventory
- List returns
- Receive goods against the returns
- Lists returned products
- Views the Returns Reports

Returns Administrator

The Returns Administrator manages the disposition of returned products.
- List returns
- Lists returned products
- Dispositions returned products

Pick Packer

The Pick Packer picks products from fulfillment centers and packs the products for shipping to customers. The Pick Packer also manages pick tickets and packing slips which are used to confirm shipment of products during order fulfillment.

- Lists pick batches
- Creates new pick batches
- Views pick tickets
- Views packing slips
- View reports
- Lists releases ready to ship
- Lists packages
- Confirms shipments
- Views inventory reports

Chapter 2. Logistics and Operations Managers: common tasks

Using collaborative workspaces

Collaboration

Whether it is a Buyer and Seller discussing details of a purchasing agreement, or a Customer Service Representative assisting a customer in placing an order, e-commerce collaboration is necessary to maintain the communication flow between parties. Traditionally, exchange of information has been achieved through phone or fax. WebSphere Commerce supports e-commerce collaboration functionality by offering two Web-based features within the WebSphere Commerce Accelerator:

- ▶ Business *Collaborative workspaces* provides a collaborative interface using Lotus QuickPlace to support business discussions, such as negotiating contract terms and conditions between a Buyer and a Seller (or Account Representative for the Seller) and amongst the business users within the Seller's organization. Collaborative workspaces support asynchronous communication. Collaborative workspaces can be created by any role other than the Buyer, by using the WebSphere Commerce Accelerator and the WebSphere Commerce default QuickPlace template. Only an Account Representative or Account Manager with QuickPlace Manager access to a collaborative workspace can add Buyers to the workspace. To use collaborative workspaces, member data must be on an LDAP server with WebSphere Commerce, not a relational database. You must also install and configure QuickPlace on a separate server from the machine where you have WebSphere Commerce and LDAP. For installation instructions, refer to the WebSphere Commerce Additional Software guide. The details about the collaborative workspaces and workspace member information are managed through the WebSphere Commerce system. Any discussion threads, postings, or file attachments used for collaboration are stored on the QuickPlace server.

- The *Customer care* feature provides real-time customer service support by way of a synchronous text interface using the Lotus Sametime server. A customer may enter the site, and click a link on the store page to connect to a Customer Service Representative (CSR) so that the two parties can communicate or chat over the Internet. A CSR accesses the customer care interface through the WebSphere Commerce Accelerator. In addition, the CSR can view the store page where the customer needs assistance, and retrieve shopping cart and profile information. This interface also allows the CSR to chat with other CSRs. To use Sametime, this must first be installed and configured with WebSphere Commerce. For instructions, refer to the WebSphere Commerce Additional Software guide.

WebSphere Commerce also provides two sample stores that demonstrate collaboration functionality. The ToolTech sample store illustrates collaborative workspaces and customer care, and the NewFashion sample store shows the customer care feature.

Listing collaborative workspaces (Business Edition)

▶ Business To view a list of collaborative workspaces that you are authorized to work with, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Store** menu, click **Collaborative Workspaces**. A list of collaborative workspaces that you are authorized to work with displays.
3. To work with an individual workspace, select the check box to the left of the workspace you want to work with and click one of the buttons on the page. **Important:**Before you can assign a member to a collaborative workspace, each member must first be recognized in the WebSphere Commerce system by way of user registration and information stored on the the LDAP server. Each member must then be associated with a collaborative workspace group: Reader, Author, or Manager.
4. To select all the workspaces in this list, select the check box icon at the top left of the list.
5. To sort the list by column, click the ![icon] icon beside the appropriate column heading. The list sorts by this column in ascending order. For example, to sort by the date that the workspace was created, starting from the most recent, click the **Created** column heading.
   Note: All columns in can be sorted except for the **Creator** column.
6. To navigate through the list, click **Top**, **Bottom**, **Next**, or **Previous**.

Creating a collaborative workspace (Business Edition)

> Business To create a collaborative workspace, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Store**menu, click **Collaborative Workspaces**. A list of collaborative workspaces that you are authorized to work with displays. If no workspaces have been created, this list is empty.
3. Click **New** to create a new collaborative workspace. The **New Collaborative Workspace** dialog opens.
4. In the **Name** field, type the name of the collaborative workspace to be created. For example, "Summer Marketing Plan."
5. In the **Short Description** field, type a brief description of the purpose of the collaborative workspace. For example, "Discuss design changes for the 2002 summer marketing event."
6. From the **Template** drop-down list, select a template to use as a base for the collaborative workspace from the list provided. For example, if the purpose of the collaborative workspace is for discussing plans for an existing contract and you have created a workspace template called "Contract", select this name from the list.
7. From the **Account** drop-down list, select the account name to be associated with the collaborative workspace.
   Note: This list is only available to roles that are authorized to work with accounts, such as a Seller, Sales Manager, or Account Representative.
8. Click **OK** to create the new collaborative workspace and to add it to the **Collaborative Workspaces** list.
9. Add members to the new collaborative workspace as follows:
   a. Select the check box to the left of the workspace you want to work with and click **Members** to list existing members. If the workspace does not currently have members associated with it, this list is empty.
   b. Click **Add** to search for a member to add to this collaborative workspace. The **Find Members to Add** dialog opens.

c. Complete at least one of the following member information fields:
Note: The system performs an advanced search based on your search criteria (for example, if you type the letter b in the **Last Name** field, the system will search for any occurrence of last names containing the letter b, not simply last names that begin with the letter b).

- In the **Logon ID** field, type the member's WebSphere Commerce logon ID.
- In the **First Name** field, type the member's first name.
- In the **Last Name** field, type the member's last name.

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

e. Depending on whether you want to add one or more members to the collaborative workspace, do one of the following:

- To add one member, select the check box to the left of the member that you want to add.
- To add multiple members, select the check boxes to the left of all the members that you want to add.
- To add all the members from this list, select the check box icon at the top left of the list.

f. If you want to notify the members that you have added them to a collaborative workspace, select the **Send an e-mail notifying users that they have been added to the collaborative workspace** check box.

g. Click **Add** to include the selected members in the **Members** list.

Changing a collaborative workspace (Business Edition)

> Business Note:You can change the description of an existing collaborative workspace, but not the name, template, or account associated with the workspace. Only a user with Manager authority for the selected collaborative workspace can change the workspace.

To change the description of a collaborative workspace, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Store**menu, click **Collaborative Workspaces**. A list of collaborative workspaces that you are authorized to work with displays.
3. Select the check box next to the workspace you want to work with and click **Change**. The **Change Collaborative Workspace** dialog opens, displaying the template and account information for the workspace.
4. In the **Short Description** field, type a brief description of the purpose of the collaborative workspace. For example, "Discuss design changes for the 2002 summer marketing event."
5. Click **OK** to change the description of the collaborative workspace.

Listing members of a collaborative workspace (Business Edition)

> Business To view a list of members for a specific collaborative workspace, do the following:

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

2. From the **Store** menu, click **Collaborative Workspaces**. A list of collaborative workspaces that you are authorized to work with displays.

3. Select the check box to the left of the workspace you want to work with and click **Members** to list the members.

4. To work with an individual member, select the check box to the left of the member name you want to work with and click one of the buttons on the page.

5. To select all the members in this list, select the check box icon at the top left of the list.

6. To sort the list by column, click the ⏷ icon beside the appropriate column heading. The list sorts by this column in ascending order. For example, to sort by last name, in alphabetical order, click the **Last Name** column heading.

7. To navigate through the list, click **Top**, **Bottom**, **Next**, or **Previous**.

Adding a member to a collaborative workspace (Business Edition)

▶ Business Note:Only a user with Manager authority for the selected collaborative workspace can add a member to the workspace.

To add a new member to an existing collaborative workspace, do the following:

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

2. From the **Store** menu, click **Collaborative Workspaces**. A list of collaborative workspaces that you are authorized to work with displays.

3. Select the check box to the left of the workspace you want to work with and click **Members** to list existing members. If the workspace does not currently have members associated with it, this list is empty.

4. Click **Add** to search for a member to add to this collaborative workspace. The **Find Members to Add** dialog opens.

5. Complete at least one of the following member information fields:
   - In the **Logon ID** field, type the member's WebSphere Commerce logon ID. By default, this is wcsadmin.
   - In the **First Name** field, type the member's first name.
   - In the **Last Name** field, type the member's last name.

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

7. Depending on whether you want to add one or more members to the collaborative workspace, do one of the following:
   - To add one member, select the check box to the left of the member that you want to add.
   - To add multiple members, select the check boxes to the left of all the members that you want to add.
   - To add all the members from this list, select the check box icon at the top left of the list.

8. By default, the **Send an e-mail notifying users that they have been added to the collaborative workspace** check box is selected to indicate that members will be notified when you have added them to a collaborative workspace. If you do not want to notify members of their membership to the workspace, ensure that this check box is not selected.

9. Click **Add** to include the selected members in the **Members** list. By default, new members are given Author authority. To change the user access to Reader or Manager authority, refer to Changing the user role for a collaborative workspace member.

Changing the user role for a collaborative workspace member (Business Edition)

> Business Note:Only a user with Manager authority for the selected collaborative workspace can change the user role for a   workspace member.

To change the user role for an existing collaborative workspace member, do the following:
1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Store** menu, click **Collaborative Workspaces**. A list of collaborative workspaces that you are authorized to work with displays.
3. Select the check box to the left of the workspace you want to work with and click **Members** to list existing members. If the workspace does not currently have members associated with it, this list is empty.
4. Click **Change Role** to change the user role for the member. The **Change Role** dialog opens.
5. Under **Role**, select one of the following:
   - To authorize the member to read or view information in the collaborative workspace, select **Reader**
   - To authorize the member to read and write information in the collaborative workspace, select **Author**.
   - To authorize the member to read and write information in the collaborative workspace; to add, change, or remove member access to the workspace, and to customized the workspace, select **Manager**.
6. Click **OK** to change the user role for the collaborative workspace member.

Removing a member from a collaborative workspace (Business Edition)

> Business Note:Only a user with Manager authority for the selected collaborative workspace can remove a member from the workspace.

To remove an existing member from a collaborative workspace, do the following:
1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Store** menu, click **Collaborative Workspaces**. A list of collaborative workspaces that you are authorized to work with displays.
3. Select the check box to the left of the workspace you want to work with and click **Members** to list existing members.
4. Depending on whether you want to remove one or more members from the collaborative workspace, do one of the following:
   - To remove one member, select the check box to the left of the member that you want to remove.
   - To remove multiple members, select the check boxes to the left of all the members that you want to remove.
   - To remove all the members from this list, select the check box icon at the top left of the list (next to the **Name** column).

5. Click **Remove** to remove the selected members from the **Members** list.

Opening a collaborative workspace (Business Edition)

▶Business To open an existing collaborative workspace, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Store**menu, click **Collaborative Workspaces**. A list of collaborative workspaces that you are authorized to work with displays.
3. Open the collaborative workspace by doing one of the following:
   - Select the check box next to the workspace you want to open and click **Open**.
   - From the **Name** column, click the name of the collaborative workspace you want to open.

   The collaborative workspace opens in a separate browser window.

Deleting a collaborative workspace (Business Edition)

▶Business Note:Only a user with Manager authority for the selected collaborative workspace can delete the workspace.

To delete an existing collaborative workspace, do the following:

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. From the **Store**menu, click **Collaborative Workspaces**. A list of collaborative workspaces that you are authorized to work with displays.
3. Select and remove collaborative workspaces, as follows:
   - To delete one collaborative workspace, select the check box next to the workspace you want to delete and click **Delete** to remove the workspace from the **Collaborative Workspaces** list.
   - To delete multiple collaborative workspaces, select the check box next to each workspace you want to delete and click **Delete** to remove the workspaces from the **Collaborative Workspaces** list.
   - To delete all the collaborative workspaces listed, select the check box icon at the top left of the list of workspaces and click **Delete** to remove the workspaces from the **Collaborative Workspaces** list.

Enabling e-mail for collaborative workspaces (Business Edition)

▶Business To enable e-mail to work with collaborative workspaces, do the following:

Note: If you want to enable e-mail notification with collaborative workspaces, ensure that when you are adding users who are not currently associated with the workspace, that both the sender and receiver have e-mail addresses associated with their profile in the database. The addresses can be stored in the Administration Console or a store's registration page, in the case of customers registering through the store. If either sender or receiver does not have an e-mail address, e-mail will not be sent.

1. Open the Administration Console and log on as an Administrator (for example, log on as `wcsadmin`). Depending on your user role, one or more menus display.

2. From the **Configuration** menu, click **Transports**. A list of transport configurations for the site displays.

3. From the list, select the check box next to **E-mail**, and click **Configure**. The **Transport Configuration Parameters** dialog opens.

4. Complete e-mail configuration information as follows:

   a. For **Host** field, type the fully-qualified host name of your e-mail server (for example, `email.torolab.ibm.com`).

   b. For the **Protocol**, ensure **SMTP** is specified.

   c. Click **OK** to save your changes, close the dialog, and return to the Administration Console main page.

5. From the **Configuration** menu, click **Message Types**. A list of message type configurations for the site displays.

6. From the list, click **New** to create a new message type for collaborative workspaces. A wizard launches, displaying the **Message Transport Assignment** page first.

7. Complete message type configuration information as follows:

   a. From the **Message Type** drop-down list, select **Notification message for Collaborative Workspaces**.

   b. In the **Message Severity** range fields, type 0 to 0.

   c. From the **Transport** drop-down list, select **E-mail**.

   d. From the **Device Format** drop-down list, select **Standard Device Format**.

   e. Click **Next**.

8. The **Message Transport Assignment** page displays parameters specified for the e-mail notification. Note that the e-mail server you provided in step 4 displays in the **Host** field on this page. Accept the defaults for the rest of the fields on this page and click **Finish**. If the **Host** field is empty, you will have to type the e-mail server (for example, `email.torolab.ibm.com`) on this page.

Maintaining fulfillment center information

Listing fulfillment centers

To list fulfillment centers, do the following:

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

2. From the **Store** menu, click **Fulfillment Centers**. The **Fulfillment Centers** list displays.

3. To work with an individual fulfillment center, select the check box next to the fulfillment center you want to work with and click one of the buttons on the page.

4. To select all the fulfillment centers in this list, select the check box icon at the top left of the list.

5. To navigate through the list, click **First**, **Last**, **Next**, or **Previous**.

Creating a fulfillment center

To create a fulfillment center, do the following:

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

2. From the **Store** menu, click **Fulfillment Centers**. The **Fulfillment Centers** list displays.

3. Click **New**. The New Fulfillment Center dialog opens.

4. Provide appropriate information for the fields. Help is available for the dialog.

5. Click **OK** to create the fulfillment center.

Changing a fulfillment center

To change a fulfillment center, do the following:

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

2. From the **Store** menu, click **Fulfillment Centers**. The **Fulfillment Centers** list displays.

3. Select the check box next to the fulfillment center that you want to work with, and click **Change**. The Change Fulfillment Center dialog opens.

4. Update the fields as required. Help is available for the page.

5. Click **OK** to save the changes.

Deleting a fulfillment center

To delete one or more fulfillment centers, do the following:

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

2. From the **Store** menu, click **Fulfillment Centers**. The **Fulfillment Centers** list displays.

3. Select the check boxes next to the fulfillment centers that you want to delete, and click **Delete**. A message confirming the deletion displays.

4. Click **OK** to delete the fulfillment centers.

Important: The fulfillment center is marked for deletion from the database when you click **OK**. To completely delete the fulfillment center, the system administrator must run the Database Cleanup utility. If a fulfillment center has items ordered against it, it cannot be marked for deletion.

Maintaining return reasons

Return reasons

A store defines its own reasons for returning a product. These reasons include those from the customer's and the merchant or seller's perspective, since these may not always be the same. For example, a customer might return a product because it doesn't work properly, but the merchant or seller might find that the customer did not follow the instructions in using the product, and that it actually works fine. Return reasons are based on the perspective of either the customer or the merchant or seller.

Return reasons must be defined before merchandise can be received from a customer, and before disposition can occur.

Listing return reasons

To list return reasons, do the following:

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

2. From the **Store** menu, click **Return Reasons**. The **Return Reasons** list displays.

3. To work with an individual return reason, select the check box next to the return reason you want to work with and click one of the buttons on the page.

4. To select all the return reasons in this list, select the check box icon at the top left of the list.

5. To navigate through the list, click **First**, **Last**, **Next**, or **Previous**.

Creating a return reason

To create a return reason, do the following:

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

2. From the **Store** menu, click **Return Reasons**. The **Return Reasons** list displays.

3. Click **New**. The New Return Reason dialog opens.

4. Provide appropriate information for the fields. Help is available for the page.

5. Click **OK** to create the return reason.

Changing a return reason

To change a return reason, do the following:

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

2. From the **Store** menu, click **Return Reasons**. The **Return Reasons** list displays.

3. Select the check box next to the return reason that you want to work with, and click **Change**. The Change Return Reason dialog opens.

4. Update the fields as required. Help is available for the page.

5. Click **OK** to save the changes.

Deleting a return reason

To delete one or more return reasons, do the following:

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

2. From the **Store** menu, click **Return Reasons**. The **Return Reasons** list displays.

3. Select the check boxes next to the return reasons that you want to delete, and click **Delete**. A message confirming the deletion displays.

4. Click **OK** to delete the return reasons.

Important: The return reason is marked for deletion from the database when you click **OK**. To completely delete the return reason, the system administrator must run the Database Cleanup utility.

Maintaining returns

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.

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 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. 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.

Chapter 3. Operations Manager: unique tasks

Maintaining returns

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 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. 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 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. 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 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. 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 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, 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 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. 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 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 **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 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. 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 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 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 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. 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 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. 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**.

   `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. 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**.

   ▶ 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. 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 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. 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 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.

- 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.

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 submissions   (Business Edition)

To search for a specific submission or group of submissions, do the following.

1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.
2. Click **Store > Find Approval Submissions**. The Approval Submissions page displays.
3. Click **Find.** The Find Approval Submissions form displays.
4. Specify the criteria appropriate to the search.
   - Request Number
     If you are looking for a specific request, insert its ID number, if known.
   - Process
     If you want to retrieve all requests for a specific process, select it here.
   - Approver
     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 here.
   - Date
     To retrieve all requests submitted either on a specific date, or within a specific period, indicate the criteria here.
5. Click **Find**. The Search Results - Approval Submissions page displays.
   If all submissions or only pending submissions are retrieved, the page will be identical in appearance to the Approval Submissions page.

If the search retrieves submissions in an approved or rejected status, the page
will include two additional columns: Approved On or Rejected On and
Remarks.

Maintaining expected inventory records

Creating an expected inventory record

To create an expected inventory record, 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 **Expected Inventory**.

   B2B From the **Products** menu, click **Expected Inventory**.
   The **Expected Inventory** list displays.

3. Click **New**. The New Expected Inventory Record wizard launches, displaying
   the General page first.

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

5. On the Details page, click **Add**. The Find Products dialog opens.

6. Search for the product you want to add to the expected inventory record by
   providing full or partial information in either or both of the **Name** and **SKU**
   fields. Click **Find**. The Find Products dialog searches
   BASEITMDSC.SHORTDESCRIPTION for **Name** queries, and
   ITEMSPC.PARTNUMBER for **SKU** queries, and displays the inventory
   matching your search criteria on the **Products - Search Results** list.

7. Select the check box next to the product you want to add to the expected
   inventory record, and click **OK**. The Add Expected Inventory Details dialog
   opens with the selected product listed.

8. Provide appropriate information for the fields and click **OK**. The Details page
   displays again, with the new detail added.

9. Click **Add** to add more products, or select a check box next to a product on
   the list and click **Change** to change it or **Remove** to remove it.

10. When you have finished adding, changing, and removing products and
    completed all pages in the wizard, click **Finish** on the Details page to create
    the expected inventory record.

Changing an expected inventory record

To view or change an expected inventory record, 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 **Expected Inventory**.

   B2B From the **Products** menu, click **Expected Inventory**.
   The **Expected Inventory** list displays.

3. Do one of the following:

   - Select the check box next to the expected inventory record that you want to
     work with, and click **Change**.

   - From the **Vendor** column, click the name of the vendor of the expected
     inventory.

The Change Expected Inventory notebook launches, displaying the General page first.

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

5. On the Details page, select the check box next to the product you want to view or change, and click **Change**. The Change Expected Inventory Details dialog opens.

6. View or update the fields as required and click **OK** to save the changes and close the notebook.

Note: Due to space constraints, the expected receipt date and comments are not displayed on the **Expected Inventory Details** list. To view this information, follow the above steps to open the Change Expected Inventory Details dialog.

Closing an expected inventory record

To close one or more expected inventory records, 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 **Expected Inventory**.

   ▶ B2B From the **Products** menu, click **Expected Inventory**.
   The **Expected Inventory** list displays.

3. Select the check boxes to the left of the expected inventory records that you want to close, and click **Close**.

4. A message displays, prompting you to confirm that you want to close the expected inventory records. Click **OK** to close them.

5. The **Expected Inventory** list refreshes, removing the closed expected inventory records.

Important: Once you close an expected inventory record, you cannot re-open it. Be sure you have received all of the inventory associated with the expected inventory record before you close it.

Deleting an expected inventory record

To delete an expected inventory record, 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 **Expected Inventory**.

   ▶ B2B From the **Products** menu, click **Expected Inventory**.
   The **Expected Inventory** list displays.

3. Select the check box next to the expected inventory record that you want to delete, and click **Delete**.

4. A message displays, prompting you to confirm that you want to delete the expected inventory record. Click **OK** to delete it.

5. The **Expected Inventory** list refreshes, removing the deleted expected inventory record. You can only delete one expected inventory record at a time.

Important: The expected inventory record is marked for deletion from the database when you click **OK**. To completely delete the expected inventory record, the system administrator must run the Database Cleanup utility.

Business intelligence reports

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

Viewing account and contract management reports (Business Edition)

` Business ` To view the account and contract management reports, 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 Accounts list displays containing the accounts defined for the store.
3. Select the check box to the left of an account.
4. Click **Reports**. The Account Management Reports list displays. Click the title of the report you want to review.
5. The selected report displays.

Order management reports

Operational reports

There are 12 operational reports available to help you efficiently manage inventory, fulfillment, and stores. These reports are designed to be accessible to users in multiple roles, as follows:

- Seller and Marketing Manager: analyzes performance and sales trends, and makes decisions about promotions and sales campaigns, in addition to other business decisions targeting revenue increase.
- Buyer, Product Manager, and Category Manager: tracks inventory, expected inventory records, receipts, and return reasons; and makes purchase order decisions.
- Operations Manager: manages fulfillment; manages orders from receipt to fulfillment; and tracks orders missing order confirmations.

The following reports are available:

- Inventory Receipts by Product report - Review inventory receipts
- Inventory Receipts through Expected Inventory Records report - Review expected inventory record receipts

- Inventory Status report - Review current inventory allocation and receipt status of products in stock
- Open Expected Inventory Records report - Review expected receipts and outstanding expected inventory records
- Order Summary report - Review and analyze store performance
- Outstanding Returns report - Determine which returned inventory has not yet been received
- Overdue Backorders report - Determine which backorders are overdue
- Inventory Adjustments report - Review inventory adjustments
- Products on Backorder report - Determine which products, and how many of each, are on backorder
- Return Receipts Not Disposed report - Determine which returned products have not been disposed
- Returns with Partial Receipts report - Determine which returns have not been fully completed due to products not received
- Shipping Exceptions report - Determine which releases are missing manifest information

Chapter 4. Pick Packer

Picking

Listing pick batches

To list pick batches, 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 **Pick Batches**.

   ▶ B2B From the **Logistics** menu, click **Pick Batches**.

   The **Pick Batches** list displays.

3. To work with an individual pick batch, select the check box next to the pick batch you want to work with and click one of the buttons on the page.

4. To select all the pick batches in this list, select the check box icon at the top left of the list.

5. To navigate through the list, click **First**, **Last**, **Next**, or **Previous**.

Creating a pick batch

To create a pick batch, 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 **Pick Batches**.

   ▶ B2B From the **Logistics** menu, click **Pick Batches**.

   The **Pick Batches** list displays.

3. Click **Create Next**.

4. A confirmation message displays when the pick batch is created.

Note: If there are more than the specified maximum number of releases available to be included in the pick batch, those releases will be included in the next pick batch. If no releases are available to create a pick batch, an informational message displays.

Viewing a pick ticket

To view a pick ticket, 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 **Pick Batches**.

   ▶ B2B From the **Logistics** menu, click **Pick Batches**.

   The **Pick Batches** list displays.

3. Select the check box next to the pick batch you want to work with, and click **View Pick Ticket**. The Pick Ticket page displays.

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

Printing a pick ticket

To view a pick ticket, 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 **Pick Batches**.
   B2B From the **Logistics** menu, click **Pick Batches**.
   The **Pick Batches** list displays.
3. Select the check box next to the pick batch you want to work with, and click **View Pick Ticket**. The Pick Ticket page displays.
4. Click **Print**.

Packing

Listing packing slips

To list packing slips, 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 **Pick Batches**.
   B2B From the **Logistics** menu, click **Pick Batches**.
   The **Pick Batches** list displays.
3. Select the check box next to the pick batch you want to work with, and click **Packing Slips**. The **Packing Slips** list displays.
4. To work with an individual packing slip, select the check box next to the packing slip you want to work with and click one of the buttons on the page.
5. To select all the packing slips in this list, select the check box icon at the top left of the list.
6. To navigate through the list, click **First**, **Last**, **Next**, or **Previous**.

Viewing a packing slip

To view a packing slip, 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 **Pick Batches**.
   B2B From the **Logistics** menu, click **Pick Batches**.
   The **Pick Batches** list displays.
3. Select the check box next to the pick batch you want to work with, and click **Packing Slips**. The **Packing Slips** list displays.
4. Select the check box next to the packing slip you want to view, and click **View**. The Packing Slip page displays.
5. Click **OK** to close the page.

Printing a packing slip

To print a packing slip, 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 **Pick Batches**.
   B2B From the **Logistics** menu, click **Pick Batches**.
   The **Pick Batches** list displays.
3. Click **Packing Slips**. The **Packing Slips** list displays.

4. Click **View**. The Packing Slip page displays.
5. Click **Print**.

Shipping

Listing releases ready to ship

To list releases ready to ship, 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 **Releases Ready to Ship**.

   ▶ B2B From the **Logistics** menu, click **Releases Ready to Ship**.
   The **Releases Ready to Ship** list displays.

3. To work with an individual release, select the check box next to the release you want to work with and click one of the buttons on the page.

4. To select all the releases in this list, select the check box icon at the top left of the list.

5. To navigate through the list, click **First**, **Last**, **Next**, or **Previous**.

Listing packages in a release

To list packages in a release, 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 **Releases Ready to Ship**.

   ▶ B2B From the **Logistics** menu, click **Releases Ready to Ship**.
   The **Releases Ready to Ship** list displays.

3. Select the check box next to the release you want to work with, and click **Packages**. The **Packages** list displays.

4. To work with an individual package, select the check box next to the package you want to work with and click one of the buttons on the page.

5. To select all the packages in this list, select the check box icon at the top left of the list.

6. To navigate through the list, click **First**, **Last**, **Next**, or **Previous**.

Adding a package to a shipment

To add a package to a shipment, 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 **Releases Ready to Ship**.

   ▶ B2B From the **Logistics** menu, click **Releases Ready to Ship**.
   The **Releases Ready to Ship** list displays.

3. Select the check box next to the release you want to work with, and click **Packages**. The **Packages** list displays.

4. Click **New**. The New Package Details dialog opens.

5. Enter information in all required fields and desired optional fields, and click **OK**.

Changing a package in a shipment

To change the information for a package in a shipment, 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, select **Releases Ready to Ship**.

   `B2B` From the **Logistics** menu, select **Releases Ready to Ship**.
   The **Releases Ready to Ship** list displays.

3. Select the check box next to the release you want to work with, and click **Packages**. The **Packages** list displays.

4. Select check box next to the package you want to change, and click **Change**. The Change Package Details dialog opens.

5. Change the information in desired fields, and click **OK**.

Deleting a package from a shipment

To delete a package from a shipment, 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 **Releases Ready to Ship**.

   `B2B` From the **Logistics** menu, click **Releases Ready to Ship**.
   The **Releases Ready to Ship** list displays.

3. Select the check box next to the release you want to work with, and click **Packages**. The **Packages** list displays.

4. Select the check box next to the package you want to delete, and click **Delete**.

Confirming shipment of a release

To confirm the shipment of a release, 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 **Releases Ready to Ship**.

   `B2B` From the **Logistics** menu, click **Releases Ready to Ship**.
   The **Releases Ready to Ship** list displays.

3. Select the check box next to the release you want to work with, and click **Confirm Shipment**. A message that the selected release has been confirmed for shipment displays. If package information has not been entered, a message prompting for that information displays. You must enter package information before confirming shipment.

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.

Listing expected inventory

To list expected inventory, do the following:

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

2. ▶ B2C From the **Merchandise** or **Operations** menu, click **Expected Inventory**.
   ▶ B2B From the **Products** or **Logistics** menu, click **Expected Inventory**. The **Expected Inventory** list displays.

3. To work with an individual expected inventory record, select the check box next to the expected inventory record you want to work with and click one of the buttons on the page.

4. To select all the expected inventory records in this list, select the check box icon at the top left of the list.

5. To navigate through the list, click **First**, **Last**, **Next**, or **Previous**.

Chapter 5. Receiver

Listing expected inventory details

To list expected inventory details, do the following:

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

2. ▶ B2C From the **Merchandise** or **Operations** menu, click **Expected Inventory**.

   ▶ B2B From the **Products** or **Logistics**menu, click **Expected Inventory**. The **Expected Inventory** list displays.

3. Select the check box next to the expected inventory record you want to work with, and click **Details**. The **Expected Inventory Details** list displays.

4. To work with an individual expected inventory detail, select the check box next to the detail line you want to work with and click one of the buttons on the page.

5. To select all the expected inventory details in this list, select the check box icon at the top left of the list.

6. To navigate through the list, click **First**, **Last**, **Next**, or **Previous**.

Note: Due to space constraints, the expected receipt date and comments are not displayed on the **Expected Inventory Details** list. To view this information on the Change Expected Inventory Details dialog, follow the steps in Changing an expected inventory record.

Listing receipts for an expected inventory record

To list receipts for an expected inventory record, do the following:

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

2. ▶ B2C From the **Merchandise** or **Operations** menu, click **Expected Inventory**.

   ▶ B2B From the **Products** or **Logistics**menu, click **Expected Inventory**. The **Expected Inventory** list displays.

3. Select the check box next to the expected inventory record you want to work with, and click **Details**. The **Expected Inventory Details** list displays.

4. Select the check box next to the detail you want to work with, and click **Prior Receipts**. The **Prior Receipts** list displays.

Receiving expected inventory

To receive expected inventory, 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 **Expected Inventory**.

   ▶ B2B From the **Logistics**menu, click **Expected Inventory**. The **Expected Inventory** list displays.

3. Select the check box next to the expected inventory record against which you want to receive inventory, and click **Details**. The **Expected Inventory Details** list displays.
4. Do one of the following:
   - Select the check box next to the SKU you want to receive, and click **Receive**.
   - From the **SKU** column, click the SKU.

   The Receive Expected Inventory dialog opens.
5. Provide appropriate information for the fields, and click **OK** to save the information.

Note: It is possible to receive more or less inventory than the expected quantity.

Adjusting inventory quantity

To adjust inventory quantity, do the following:
1. Open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display.

   B2C From the **Operations** menu, click **Find Inventory**.

   B2B From the **Logistics** menu, click **Find Inventory**.

   The Find Inventory dialog opens.
2. Search for the inventory you want to adjust by providing full or partial information in either or both of the **Name** and **SKU** fields. Click **Find**. The Find Inventory dialog searches BASEITMDSC.SHORTDESCRIPTION for **Name** queries, and ITEMSPC.PARTNUMBER for **SKU** queries, and displays the inventory matching your search criteria on the **Inventory - Search Results** list.
3. Select the check box next to the SKU whose quantity you want to adjust, and click **Adjust Quantity**. The Adjust Quantity dialog opens.
4. Provide appropriate information for the fields, and click **OK**.

Important: Do not use the Adjust Quantity dialog to receive inventory. If your inventory has an associated expected inventory record, use the **Expected Inventory** list to receive it. Otherwise, use the Ad Hoc Receipt dialog.

Creating an ad hoc inventory receipt

To create an ad hoc inventory receipt, do the following:
1. **B2C** From the **Operations** menu, click **Find Inventory**.

   B2B From the **Logistics** menu, click **Find Inventory**.

   The Find Inventory dialog opens.
2. Search for the inventory you want to receive by providing full or partial information in either or both of the **Name** and **SKU** fields, and click **Find**. The Find Inventory dialog searches BASEITMDSC.SHORTDESCRIPTION for **Name** queries, and ITEMSPC.PARTNUMBER for **SKU** queries, and displays the inventory matching your search criteria on the **Inventory - Search Results** list.
3. Select the check box next to the SKU you want to receive, and click **Ad Hoc Receipt**. The Ad Hoc Receipt dialog opens.
4. Provide appropriate information for the fields, and click **OK**.

Chapter 6. Returns Administrator

Listing returned products

To list returned products, 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 **Returns**.
   B2B From the **Logistics** menu, click **Returns**.
   The **Returns** list displays.

3. Select the check box next to the return you want to work with, and click **Returned Products**. The **Returned Products** list displays.

4. To work with an individual returned product, select the check box next to the returned product you want to work with and click one of the buttons on the page.

5. To navigate through the list, click **First**, **Last**, **Next**, or **Previous**.

Selecting the disposition of returned products

To select the disposition of returned products, 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 **Returns**.
   B2B From the **Logistics** menu, click **Returns**.
   The **Returns** list displays.

3. Select the check box next to the return you want to work with, and click **Returned Products**. The **Returned Products** list displays.

4. Select the check box next to the returned product you want to work with, and click **Disposition**. The Disposition page displays.

5. Provide appropriate information for the fields, and click **Add** to save the information.

Creating and viewing operational reports

You can create and view operational reports in several ways, depending upon the reports you want to run. In all cases, you need to open the WebSphere Commerce Accelerator. Depending on your user role, one or more menus display. Note that some reports can be accessed by more than one method, and that you may not have access to some reports.

Important: Operational reports return information based on what is in the database. Data marked for deletion will be included in the reports, while data that has been removed from the database by the Database Cleanup utility will not.

To create and view inventory reports, do the following:

1. **B2C** From the **Operations** menu, click **Inventory Reports**.
   B2B From the **Logistics** menu, click **Inventory Reports**.
   The **Inventory Reports** list displays.

2. Select one of the following reports. Help is available for each report.
   - Inventory Receipts by Product report
   - Inventory Adjustments report
   - Inventory Status report
   - Products on Backorder report
   - Open Expected Inventory Records report

To create and view order management reports, do the following:

1. **B2C** From the **Operations** menu, click **Order Management Reports**.
   B2B From the **Sales** menu, click **Order Management Reports**.
   The **Order Management Reports** list displays.
2. Select one of the following reports. Help is available for each report.
   - Order Summary report
   - Overdue Backorders report

To create and view return management reports, do the following:

1. **B2C** From the **Operations** menu, click **Returns**.
   B2B From the **Logistics** menu, click **Returns**.
   The Returns page displays.
2. Click **Reports**. The **Return Management Reports** list displays.
3. Select one of the following reports. Help is available for each report.
   - Returns with Partial Receipts report
   - Return Receipts Not Disposed report
   - Outstanding Returns report

To create and view expected inventory reports, do the following:

1. **B2C** From the **Merchandise** or **Operations** menu, click **Expected Inventory**.
   B2B From the **Products** or **Logistics** menu, click **Expected Inventory**.
   The **Expected Inventory** list displays.
2. Click **Reports**. The **Expected Inventory Reports** list displays.
3. Select one of the following reports. Help is available for each report.
   - Open Expected Inventory Records report
   - Inventory Receipts through Expected Inventory Records report

To create and view product reports, do the following:

1. **B2C** From the **Merchandise** menu, click **Products**.
   B2B From the **Products** menu, click **Products**.
   The **Products** list displays.
2. Click **Reports**. The **Product Reports** list displays.
3. Select one of the following reports. Help is available for each report.
   - Inventory Receipts by Product report
   - Inventory Status report
   - Products on Backorder report
   - Outstanding Returns report

To create and view the Shipping Exceptions report, do the following:

1. ▶ B2C   From the **Operations** menu, click **Pick Batches**.

   ▶ B2B   From the **Logistics** menu, click **Pick Batches**.
   The **Pick Batches** list displays.

2. Click **Reports**. The Shipping Exceptions report dialog opens. Help is available for this report.

Appendix. Learning Guides

Logistics Manager Learning Guide

The Logistics Manager is primarily responsible for managing fulfillment and monitoring shipping information. In addition the Logistics Manager supervises the activities of the following user roles: Receiver, Return Administrator and Pick Packer. The Logistics Manager role existing in a business to business site. The corresponding role in a business-to-consumer store is the Operations Manager.

Learning objectives:
Learn how to perform the following tasks by using the WebSphere Commerce Accelerator.

- Manage fulfillment
- Manage shipping information

Prerequisite skills:
You should understand store procedures and how to use a Web browser.

Getting Started:
From the navigation frame click **Roles -> Logistics/Operations -> Logistics Manager**.
You will see a list of applicable online help topics.

Operations Manager Learning Guide

The Operations Manager can perform all tasks assigned to the following user roles: Receiver, Returns Administrator, and Pick Packer.

Learning objectives:
Learn how to perform the following tasks using the WebSphere Commerce Accelerator.

- Manage fulfillment
- Monitor shipping information
- Search for customer orders
- Create and edit returns

Prerequisite skills:
You should understand store procedures and how to use a Web browser.

Getting Started:
From the navigation frame click **Roles -> Logistics/Operations -> Operations Manager.**
You will see a list of applicable online help topics.

Pick Packer Learning Guide

In WebSphere Commerce a Pick Packer is a defined role that picks products from fulfillment centers and packs the products for shipping to customers. The Pick Packer also manages pick tickets and packing slips which are used to confirm shipment of products during order fulfillment.

Learning objectives:
Learn how to use the WebSphere Commerce Accelerator to perform the following tasks:

- List pick batches
- Create a pick batch
- View a pick ticket
- Print a pick ticket

Prerequisite skills:
You should understand store procedures and how to use a Web browser.

Getting Started:
From the navigation frame click **Roles -> Logistics/Operations -> Pick Packer**.
You will see a list of applicable online help topics.

Receiver Learning Guide

Learning objectives:
Learn how to receive inventory by using the WebSphere Commerce Accelerator.
You will learn how to:

- Receive inventory at the fulfillment center
- Track expected inventory records and ad hoc receipts for ordered products
- Receive returned products as a result of customer returns
- Adjust inventory quantities

Prerequisite skills:
You should understand store procedures and how to use a Web browser.

Getting Started:
From the navigation frame click **Roles -> Logistics/Operations -> Receiver**.
You will see a list of applicable online help topics.

Returns Administrator Learning Guide

Learning objectives:
Learn how to set the disposition of returned products by using the WebSphere Commerce Accelerator. You will learn how to:

- Manage the disposition of returned products.

Prerequisite skills:
You should understand store procedures and how to use a Web browser.

Getting Started:
From the navigation frame click **Roles -> Logistics/Operations -> Returns Administrator**.
You will see a list of applicable online help topics.

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