



BF Admin Module Orders.doc

Last Updated: 28-Feb-2014

TABLE OF CONTENTS

<u>1</u>	<u>Modification History</u>	4
<u>2</u>	<u>Navbar and Sub-Menu</u>	6
<u>3</u>	<u>View Orders</u>	7
3.1	Search Capability	7
3.2	List	7
3.3	Sort Sequence	7
3.4	Visual Guideline	7
3.5	Order Status Workflow	8
3.6	Processing Notes	9
3.7	Toolbar Actions	9
3.8	Pick-up-in-Store Indicator	10
3.9	Link Actions	10
3.10	Button Actions	10
3.11	Technical Note	11
<u>4</u>	<u>Order Detail</u>	12
4.1	UI Guideline: Header	12
4.2	UI Guideline: Customer Information	12
4.3	UI Guideline: Order Items	13
4.4	UI Guideline: Payments	13
4.4.1	General	13
4.4.2	Credit Card, fully paid	14
4.4.3	Credit Card, initially paid, subsequent Refund	14
4.4.4	Gift Card	15
4.4.5	Pay In Store (EXT COD), no payments	15
4.4.6	Pay In Store (EXT COD), with subsequent payments	16
4.4.7	Split Payments Credit Card Gift Card, fully paid and refund	16
4.5	UI Guideline: Shipping Information	17
4.6	Order Note List	17
4.7	UI Guideline: Order Attributes	17
4.8	UI Guideline: Footer	18
4.9	Future Phase Considerations	18
<u>5</u>	<u>Apply a Payment</u>	19
5.1	Overview	19
5.2	Payment Method	19
5.3	Credit Card, use card on file	19
5.4	Credit Card, enter a new card	19
5.5	Offline Payment, Check, Cash or Money Order	20
5.6	Technical Notes	20
<u>6</u>	<u>PDF Export</u>	22
<u>7</u>	<u>Change Order</u>	23
7.1	Overview	23
7.2	Adjusting BF-Inventory	23
7.3	Visual Guideline	23
7.4	Technical Notes: OFBiz Mapping	25
7.5	Processing	25
7.6	Product Returns enablement rules	28

7.7	"Complete (Ship) an Order"	29
7.8	Validation	31
7.9	Warnings	31
7.10	Button Action	31
8	Financial Adjustments	32
8.1	Overview	32
8.2	UI Example (Simple Cancel)	32
8.3	UI Example (Returns)	33
8.4	UI Example (Change Qty)	35
8.5	Technical Notes	35
8.6	Future Considerations	36
9	Order Shipping Details	37
9.1	Overview	37
9.2	UI Guideline	37
9.3	Processing	37
10	Order Item Detail	39
10.1	Overview	39
10.2	Visual Guideline	39
10.3	Processing	40
10.4	Carrier's Tracking Detail	40
10.5	Order Item Attributes	41
11	Order Notes	42
11.1	Note List UI Guideline	42
11.2	Processing	42
11.3	Note Detail UI Guideline	42
12	Status Update History	44
12.1	UI Guideline	44
12.2	Processing	44
13	Payment Detail Page	45
13.1	Top Section	45
13.2	Collapsed Payment Details	45
13.3	Expanding a Payment Detail	46
13.4	Processing	48
13.5	Technical Notes	48
14	Order Status Summary	50
14.1	UI Guideline	50
14.2	Processing	50

1 Modification History

Date	Who	Comments
24-Aug-11	Solveda	Split from initial "BF Admin Module" document, refer to this document for general concepts, processing and prior modification history.
25-Aug-11	Solveda	Modified concept of "Download" to "Export"
26-Sep-11	Solveda	Added Order-TIME to the order detail screen (part of the Order Date display)
7-Oct-11	Solveda	Various mods: <ul style="list-style-type: none"> - Changed list sequence to Order-Date, most recent first. - Changed Address Display on order detail - Added a total on the list screen
11-Oct-11	Solveda	<ul style="list-style-type: none"> - Added "Back" button to screens, left-most position - Added a "link" action when clicking the Customer# - Changed auto-retrieve rules - Clarified PDF name on Export
3-Nov-11	Solveda	Full credit-card to be available on PDF
15-Nov-11	Solveda	Changed all read-only data displays to be not-bold.
9-Dec-11	Solveda	Added Promo-Code to the View-Orders screen. Primary usage will be from a link from the Promotions screen (see spec <i>BF-Admin-Module-Promotions</i>)
19-Dec-11	Solveda	Add Promo-Code to Order-Detail with link to the Promotions-List screen.
24-Dec-11	Solveda	Order List: added the Adj, Ship, Tax dollars so that all \$ information is displayed.
27-Dec-11	Solveda	Added ability to "complete" and order
28-Dec-11	Solveda	Added "Item#" to line items in Order Detail
5-Jan-12	Solveda	Order Status changes, review with LS
6-Jan-12	Solveda	Added "Notes" to the Order-Detail page with the ability to add/edit in the Order-Note-Detail page
9-Jan-12	Solveda	Clarifications added for Order-Status change function
2-Mar-12	Solveda	Changes to reflect "Store Pickup" Orders (search in the list orders screen; shipping-method is "Store Pickup", Shipping Address reflects the Store Address)
14-May-12	Solveda	Added Export-to-XML function
8-Jun-12	Solveda	Phone information moved to the "Personal Information" section for a user, no longer associated with addresses
25-Jun-12	Solveda	Increase BF-Inventory attributes when order or order-item is cancelled
27-Jun-12	Solveda	Disallowed status-changes that cannot be supported: <ul style="list-style-type: none"> Completed -> Approved Cancelled -> Approved
29-Aug-12	Solveda	Added "Offer Price" on line item; added ability to view "attributes".
12-Sep-12	Solveda	Limit Order Status Codes to those used in BigFish
23-Oct-12	Solveda	Reworked to be more consistent with Catalog and Customer modules.
1-Nov-12	Solveda	Expanded Order-Status search
1-Nov-12	Solveda	Added Item# and Pmt-Pref-ID to Order Status History; Added

		page "Payment Detail" with links from Order Detail and Order Status History.
14-Feb-13	Solveda	Order Detail: if order has partial or full shipments then allow for shipping details to be displayed.
3-Apr-13	Solveda	Process Credit Card refunds for cancelled orders in Status Change function.
9-Apr-13	Solveda	Add "Quick XYZ" function in Order Status change
2-May-13	Solveda	Added order totals to the general Order Header component. Included validation for "Can be Returned?" in Order Status Change function.
6-May-13	Solveda	Special processing for BLUE DART clients
16-May-13	Solveda	Added "packaging" considerations when Completing an Order; added ability to view "shipments"
16-May-13	Solveda	Added Product# to Search Orders screen
11-Jun-13	Solveda	Added ORDER_ITEM_ATTRIBUTE displays on the Item Detail
18-Jun-13	Solveda	Added Shipping-Instructions to Shipping Detail page
25-Jun-13	Solveda	Allowed for multiple payments in Order-Detail page and ability to see each payment on Payment Details screen.
2-Jul-13	Solveda	Order Detail clearly shows Balance Due, and if greater than zero then payments can be tracked via new function "Apply a Payment"
9-Dec-13	Solveda	Added "Shipment Group" (potential multi shipping groups) to Order Shipping Details
31-Dec-13	Solveda	Added "warning" if the Ship Date is in the future
17-Jan-14	Solveda	Added Misc Adjustment Mapping
23-Jan-14	Solveda	Added display of Misc Financial Adjustment on Prior adjustments
19-Feb-14	Solveda	Added Adjustment Amount to Cancel/Return Process
24-Feb-14	Solveda	Reworked Order-Detail, Order-Shipping-Detail displays
27-Feb-14	Solveda	Added Return and Cancel Qty to order item display

2 Navbar and Sub-Menu

orders

View Orders

This function provides the ability to search for orders in the database. A list of orders is displayed, with a click-through to the Order Detail screen.

Add an Order

This function will allow for the quick addition of a Sales Order.

Order Status Summary

Quick snapshot of all Orders summarized by Order Status

3 View Orders

3.1 Search Capability

Column	Processing
Order#	Exact match
Order Date Range	Exact match, configuration will determine format
Email	ignore case, perform a "contains" function
Order Status	Exact match, default all checked
Export Status	Exact match, default all checked
Promo Code	Exact match

3.2 List



Column	Alignment, formatting rules, comment
Order#	centered
Order Date	centered
Customer#	centered
Customer Name	left-aligned, Last + ", " + First,
Email Address	left-aligned
Order Status	centered
Export Status	centered
Total Order Amount	right aligned

3.3 Sort Sequence



- Order Date, most recent order first

3.4 Visual Guideline

view orders

Enter Search Criteria						<input type="checkbox"/> All St	
Order#:	<input type="text"/>	Order Date:	<input type="text"/>		To:	<input type="text"/>	
Customer#:	<input type="text"/>	Email:	<input type="text"/>				
Order Status:	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> Created <input checked="" type="checkbox"/> Approved <input checked="" type="checkbox"/> Completed <input checked="" type="checkbox"/> Rejected <input checked="" type="checkbox"/> Cancelled						
Export Status:	<input checked="" type="checkbox"/> All <input checked="" type="checkbox"/> New <input checked="" type="checkbox"/> Exported		Product#:	<input type="text"/>	Promo Code:	<input type="text"/>	
<input type="button" value="Search"/>							

<< Previous Page			Showing Rows 1-8 of 300					
Matching Orders								
Order#	Order Date	Cust#	Customer Name	Email	Order Status	Export Status	Item\$	Ac

WS10011	8/12/10	PARTY01	Last, First	bob@bob.com	Cancelled	New	\$350.00	(\$4.
WS10010	7/12/10	PARTY03	Last, First	bob@bob.com	Approved	Exported	\$350.00	
WS10009 	6/12/10	PARTY02	Last, First	bob@bob.com	Created	Exported	\$350.00	(\$4.
WS10008	5/12/10	PARTY01	Last, First	bob@bob.com	Sent	New	\$350.00	(\$4.
WS10007	4/12/10	PARTY03	Last, First	bob@bob.com	Completed	Exported	\$350.00	
WS10006 	3/12/10	PARTY02	Last, First	bob@bob.com	Cancelled	New	\$350.00	
WS10005	2/12/10	PARTY01	Last, First	bob@bob.com	Approved	New	\$350.00	

[Back](#)

3.5 Order Status Workflow

- Based on current BigFish implementation
- Customer is shopping, adding items to the Cart
 - SHOPPING_LIST entity stores cart details
 - ORDER entities are not created
- Customer begins check-out process
 - SHOPPING_LIST entity stores cart details
 - ORDER entities are not created
- Customer completes the check-out form
- BigFish validates all form fields (address, name, basic credit card validation)
 - If any fields NOT valid then display error
 - ORDER entities are still NOT created
- If all the information is valid:
 - BigFish prepares to call the Payment Gateway
 - ORDER_HEADER created with status ORDER_CREATED
- If Payment Gateway declines Auth/Capture:
 - ORDER_HEADER is set to ORDER_REJECTED
 - if parameter FEEDS_IGNORE_REJECTED_ORDERS is set to TRUE then ORDER_REJECTED orders will NOT be exported (set to TRUE for Moda)
- If Payment Gateway is successful:
 - ORDER_HEADER is set to ORDER_APPROVED
 - will be included in Order Export processing
- Orders with a status of ORDER_CREATED
 - In theory, there should not be any orders that still have a status of ORDER_CREATED.
 - They should have been flipped to either ORDER_REJECTED or ORDER_APPROVED
 - However, it is possible that if a technical error or pre-call fails that this could occur

- Orders with a ORDER_CREATED status indicate a problem that requires research.

3.6 Processing Notes

■ Order Status

- The actual checkboxes to be offered are built dynamically based on the system parameter ORDER_STATUS_INC_SEARCH
- This parameter identifies specific Status ID values
- The display caption should be derived from the STATUS_ITEM.DESCRPTION attribute. In SQL, this is solved as follows:

```
SELECT DESCRIPTION
FROM STATUS_ITEM
WHERE STATUS_TYPE_ID = 'ORDER_STATUS'
AND STATUS_ID IN ([ORDER_STATUS_INC_SEARCH])
ORDER BY SEQUENCE_ID
```





- Technical Consideration:
 - Store values in the session
 - This query, or equivalent, should NOT be executed query every time the Order List screen is visited

■ List Screen should NOT retrieve any rows until the user clicks on the Search button.


- If this screen is being accessed via another function that is supplying search criteria then pre-retrieve data as per the criteria.
- If accessing via the Dashboard:
 - Order counts must match
 - Dates must match those from the Dashboard page
 - Order Status values must be checked according to the system parameter ORDER_STATUS_INC_DASHBOARD
 - See specs "BF Admin Module Dashboard.doc" and "BF Admin Module Admin.doc" for more information
- If accessing via the Customer screen:
 - All Order Status values will be checked
 - Pre-Retrieve for the specific Customer#

3.7 Toolbar Actions

- - This is a special toolbar icon that further groups other row level icons
 - In subsequent screens the individual icons are displayed in the bottom right of the specific screen

- All toolbar tips and actions are to be used as described below, whether included within this special toolbar icon or as detail icons
- - Tooltip is set to "Order Details"
 - Redirect to the Order Detail page
- 
 - Tooltip is set to "Order Notes [n]"
 - Redirect to Order Notes page
- 
 - Tooltip is set to "Order Status History"
 - Redirect to Order Status History page
- 
 - Tooltip is set to:
 - On list row and detail pages: "Export Order to PDF"
 - On list page: "Export ALL Orders on this page to PDF"
 - This is ONLY available on the List Screen and primary Order Detail Screen
 - See section "PDF Export"
- 
 - Tooltip is set to
 - On list row and detail pages: "Export Order to XML"
 - On list page: "Export ALL Orders on this page to XML"
 - This is ONLY available on the List Screen and primary Order Detail Screen
 - Export data to XML format; this function should re-direct to the export function documented in the "*BF Admin Module Feeds.doc*" specification

3.8 Pick-up-in-Store Indicator

- If the Order is a Pickup-In-Store order then indicate with a  after the Order#
- Tech Notes:
 - Shipping method: NO_SHIPPING
 - Order Payment: EXT_OFFLINE
 - Order Role: Role Type Id 'STORE_LOCATION'
 - ORDER_ATTRIBUTE
 - ATTR_NAME = "DELIVERY_OPTION"
 - ATTR_VALUE = "SHIP_TO" or "STORE_PICKUP"

3.9 Link Actions

- Order#: redirect to the Order Detail page
- Customer#: redirect to the Customer Detail page (see BF-Admin-Module-Customers)

3.10 Button Actions

- Back: simulate browser "back" functionality

3.11 Technical Note

- For downloaded status and date use the entity ORDER_HEADER_ATTRIBUTE

ATTR_NAME = IS_DOWNLOADED
ATTR_NAME = DATETIME_DOWNLOADED

- Values:

IS_DOWNLOADED = "Y": order has been downloaded / exported

IS_DOWNLOADED = null: order is NEW, not downloaded

DATETIME_DOWNLOADED: the date/time that the order was downloaded

4 Order Detail

4.1 UI Guideline: Header

order detail (WS10046)

Order WS10046 Information		Store: XY
Order#:	WS-100046	Order Status: Approved Change
Order Date:	12/05/10 at 02:46pm	Export Status: New
Visit ID:	100987	Created By: customer@client.com

- Visit ID
 - Links to the Visit Detail Page
 - See spec "[BF Admin Module Customers.doc](#)" for details
- Button Actions
 - Order Status: Change button
 - redirects to the "[Order Status Change](#)" page

4.2 UI Guideline: Customer Information

Customer Information	
Customer ID:	PARTY001
Customer Name:	Steven Smith
Email Address:	ssmith@company.com
Home Phone:	999-888-7654
Cell Phone:	111-222-3333
Work Phone:	888-999-3333 x546
Billing Address:	Helen Smith 35 Helen Avenue Mineola, NY 11501
Ship Method:	USPS
Shipping Address:	David Smith 178 David Street Mineola, NY 11501

- "Customer Name"
 - Technical: from the PERSON entity
 - FIRST_NAME
 - MIDDLE_NAME
 - LAST_NAME
- "Billing Address Name" and "Shipping Address Name"
 - Technical: from the POSTAL_ADDRESS entity
 - TO_NAME
- Pick-up-in-store Order
 - "Shipping Method" should state "PICKUP IN STORE"
 - "Shipping Address" should reflect the address of the Store
- Link Actions

- Customer#: redirect to the Customer Detail page (see *BF-Admin-Module-Customers*)

4.3 UI Guideline: Order Items

Order Items										
Item Seq ID	Product#	Item#	Product Name	Item Status	Qty	Return Qty	Cancel Qty	Unit Price	Offer Price	Adj\$
0001	10011	EK63	Emma	Complete	10	1	0	\$37.99	\$34.19	\$0.00
0002	10023	EK64	Emma	Complete	1	0	0	\$23.99		\$0.00
									Items Sub Total:	
									Promotion (DOLLAROFF):	
									Shipping and Handling:	
									Sales Tax (6.125%):	
									Adjustments:	
									Order Total:	

- Order ITEMS: should show ALL available items, no paging should be applied
- Item Seq ID
 - Links to the Order Item Detail Page
- Offer Price
 - If a line item promotion was applied then the Offer Price should be displayed
 - The Info icon ⓘ
 - should display the promo code as a tool-tip display, example: "Line Item Promotion TENOFFITEM was applied"
- Link Actions
 - Product#: redirect to the Product Detail page (see *BF-Admin-Module-Catalog*)
 - Promo Code: redirect to the Promotions Detail page (see *BF-Admin-Module-Promotion*)
- Technical Notes
 - Return Qty: RETURN_ITEM.RETURN_QTY
 - Cancel Qty: ORDER_ITEM.CANCEL_QTY

4.4 UI Guideline: Payments

4.4.1 General

- All processing is driven from the ORDER_PAYMENT_PREFERENCE entity
 - Only preferences, methods and payments for the displayed order should be shown
- Most orders will only have one ORDER_PAYMENT_PREFERENCE and potentially many related PAYMENTS

- Only orders which have “split” payments would have more than one ORDER_PAYMENT_PREFERENCE
- For all Payment Method types (CC, Gift Card, COD, EFT, etc) the related PAYMENTS record the transactions based on the ORDER_PAYMENT_PREFERENCE
- UI Guidelines show “descriptions” for the translation of various codes, types and status values:
 - PAYMENT_TYPE.DESCRPTION
 - PAYMENT_METHOD_TYPE.DESCRPTION
 - STATUS_ITEM.DESCRPTION

4.4.2 Credit Card, fully paid

■ Data

ORDER_PAYMENT_PREFERENCE			
PAYMENT_METHOD_TYPE	AMOUNT	STATUS	DTM
CREDIT_CARD	987.63	PAYMENT_SETTLED	06/13/2013 05:21pm

PAYMENT				
PAYMENT_TYPE	PAYMENT_METHOD_TYPE	AMOUNT	STATUS_ID	DTM
CUSTOMER_PAYMENT	CREDIT_CARD	987.63	PMNT_RECEIVED	06/13/13 05:23pm

■ UI

Payment Information				
Date	Payment Type	Amount	Status	
06/13/2013 05:21pm	Credit Card (Visa) *1111 Exp:04/2013	\$987.63	Settled	
06/13/2013 05:23pm	Customer Payment	\$987.63	Received	

- Payment Information Helper
 - Tooltip is set to “View Payment Details”
 - Redirect to Payment Details Page, indicating which Payment is to be shown in the event that there are multiple payments

4.4.3 Credit Card, initially paid, subsequent Refund

■ Data

ORDER_PAYMENT_PREFERENCE			
PAYMENT_METHOD_TYPE	AMOUNT	STATUS	DTM
CREDIT_CARD	987.63	PAYMENT_SETTLED	06/13/2013 05:21pm

PAYMENT				
PAYMENT_TYPE	PAYMENT_METHOD_TYPE	AMOUNT	STATUS_ID	DTM
CUSTOMER_PAYMENT	CREDIT_CARD	987.63	PMNT_RECEIVED	06/13/13 05:23pm
CUSTOMER_REFUND	CREDIT_CARD	250.00	PMNT_SENT	06/21/13 04:00pm

■ UI

Payment Information				
Date	Payment Type	Amount	Status	
06/13/2013 05:21pm	Credit Card (Visa) *1111 Exp:04/2013	\$987.63	Settled	
06/13/2013 05:23pm	Customer Payment (Credit Card)	\$987.63	Received	
06/21/2013 04:00pm	Customer Refund (Credit Card)	\$250.00	Sent	

4.4.4 Gift Card

■ Data

ORDER_PAYMENT_PREFERENCE			
PAYMENT_METHOD_TYPE	AMOUNT	STATUS	DTM
GIFT_CARD	987.63	PAYMENT_SETTLED	06/13/2013 05:21pm

PAYMENT				
PAYMENT_TYPE	PAYMENT_METHOD_TYPE	AMOUNT	STATUS_ID	DTM
CUSTOMER_PAYMENT	GIFT_CARD	987.63	PMNT_RECEIVED	06/13/13 05:23pm
CUSTOMER_REFUND	CREDIT_CARD	250.00	PMNT_SENT	06/21/13 04:00pm

■ UI

Payment Information				
Date	Payment Type	Amount	Status	
06/13/2013 05:21pm	Gift Card (876655212)	\$987.63	Settled	
06/13/2013 05:23pm	Customer Payment (Gift Card)	\$987.63	Received	


4.4.5 Pay In Store (EXT_COD), no payments


■ Data

ORDER_PAYMENT_PREFERENCE			
PAYMENT_METHOD_TYPE	AMOUNT	STATUS	DTM
EXT_COD	987.63	PAYMENT_NOT_RECEIVED	06/13/2013 05:21pm

PAYMENT				
PAYMENT_TYPE	PAYMENT_METHOD_TYPE	AMOUNT	STATUS_ID	DTM

■ UI

Payment Information				
Date	Payment Type	Amount	Status	
06/13/2013 05:21pm	Pickup in Store	\$987.63	Payment Not Received	
	Balance Due	\$987.63		

- Balance Due
 - Only display if the balance is NOT zero
 - Icon  redirects to the Apply a Payment page
 - Technical Notes:

- To determine if the order has an open amount (Balance Due) use service OrderReadHelper.getOpenOrderAmount
- This service compares the sum of 'settled' order payment preferences less refunds to an Order 'Grand Total' amount.

4.4.6 Pay In Store (EXT_COD), with subsequent payments

■ Data

ORDER_PAYMENT_PREFERENCE			
PAYMENT_METHOD_TYPE	AMOUNT	STATUS	DTM
EXT_COD	987.63	PAYMENT_NOT_RECEIVED	06/13/2013 05:21pm

PAYMENT				
PAYMENT_TYPE	PAYMENT_METHOD_TYPE	AMOUNT	STATUS_ID	DTM
CUSTOMER_PAYMENT	CASH	100.00	PMNT_RECEIVED	06/14/2013 04:00pm
CUSTOMER_PAYMENT	CHECK	50.00	PMNT_RECEIVED	06/18/2013 09:00am
CUSTOMER_PAYMENT	CHECK	25.00	PMNT_RECEIVED	06/21/2013 10:30am
CUSTOMER_PAYMENT	MONEY_ORDER	80.00	PMNT_RECEIVED	06/23/2013 03:15pm
CUSTOMER_PAYMENT	CASH	250.00	PMNT_RECEIVED	06/23/2013 11:00am
CUSTOMER_PAYMENT	CHECK	132.63	PMNT_RECEIVED	06/25/2013 08:30pm

■ UI

Payment Information				
Date	Payment Type	Amount	Status	
06/13/2013 05:21pm	Pickup in Store	\$987.63	Payment Not Received	
06/14/2013 04:00pm	Customer Payment (Cash)	\$100.00	Received	
06/18/2013 09:00am	Customer Payment (Check 100989)	\$50.00	Received	
06/21/2013 10:30am	Customer Payment (Check 100990)	\$25.00	Received	
06/23/2013 03:15pm	Customer Payment (Money Order 12)	\$80.00	Received	
06/23/2013 11:00am	Customer Payment (Cash)	\$250.00	Received	
06/25/2013 08:30pm	Customer Payment (Check 100991)	\$132.63	Received	
Balance Due		\$350.00	\$	

4.4.7 Split Payments Credit Card Gift Card, fully paid and refund

■ Data

ORDER_PAYMENT_PREFERENCE			
PAYMENT_METHOD_TYPE	AMOUNT	STATUS	DTM
CREDIT_CARD	937.63	PAYMENT_SETTLED	06/13/2013 05:21pm
GIFT_CARD	50.00	PAYMENT_SETTLED	06/13/2013 05:22pm

PAYMENT				
PAYMENT_TYPE	PAYMENT_METHOD_TYPE	AMOUNT	STATUS_ID	DTM
CUSTOMER_PAYMENT	CREDIT_CARD	987.63	PMNT_RECEIVED	06/13/2013 05:23pm
CUSTOMER_PAYMENT	GIFT_CARD	50.00	PMNT_RECEIVED	06/13/2013 05:24pm
CUSTOMER_REFUND	CREDIT_CARD	250.00	PMNT_SENT	06/21/2013 04:00pm

■ UI

Payment Information				
Date	Payment Type	Amount	Status	
06/13/2013 05:21pm	Credit Card (Visa) *1111 Exp:04/2013	\$937.63	Settled	
06/13/2013 05:23pm	Customer Payment (Credit Card)	\$937.63	Received	
06/21/2013 04:00pm	Customer Refund (Credit Card)	\$250.00	Sent	
06/13/2013 05:22pm	Gift Card (876655212)	\$50.00	Settled	
06/13/2013 05:23pm	Customer Payment (Gift Card)	\$50.00	Received	

4.5 UI Guideline: Shipping Information

Shipping Information			
Ship Group	Ship Date	Ship Method	Tracking#
0001	1/1/2013	USPS Standard	T-987766HQA-98
0002	1/3/2013	USPS Standard	T-987745FDG-03

- Tracking#:
 - Product can be shipped to the customer and are tracked within OFBiz as one of more "Ship Groups"
 - Ship Groups consist of
 - Shipping Date
 - Shipping Method
 - Tracking Number
 - On click, the icon will redirect to the "[*Order Shipping Details*](#)" page

4.6 Order Note List

- Extract from entities ORDER_HEADER_NOTE and ORDER_HEADER_NOTE_VIEW
 - Note# ORDER_HEADER_NOTE.NOTE_ID
 - By ORDER_HEADER_NOTE_VIEW.NOTE_PARTY
 - Date ORDER_HEADER_NOTE.LAST_UPDATE_STAMP (date)
 - Time ORDER_HEADER_NOTE.LAST_UPDATE_STAMP (time)
 - Note ORDER_HEADER_NOTE_VIEW.NOTE_INFO

4.7 UI Guideline: Order Attributes

Order WS10046 Attributes	
Attribute	Value
IS_DOWNLOADED	Y
DOWNLOADED_DTM	01/09/12 09:34:45am
AFFILIATE_TRACKING	ACME

- This is a simple display of the entity ORDER_ATTRIBUTE
 - Attribute Name ORDER_ATTRIBUTE.ATTR_NAME
 - Value ORDER_ATTRIBUTE.ATTR_VALUE

4.8 UI Guideline: Footer

Back



- Button Actions
 - Back: simulate the browser “back” function
 - The Export buttons have the same functionality as the Export buttons on the Order list screen (print or send to file, set status etc.)
 - Add Note: redirect to the Order Note Detail page, in “add” mode
- Toolbar Actions
 - See requirements in the View Orders section above

4.9 Future Phase Considerations

- Changing Shipping Method (Pickup-in-Store vs Home-Delivery)
 - FROM Pickup-in-Store TO Home-Delivery
 - Do we need to do a credit-card charge?
 - Other considerations?
 - FROM Home-Delivery TO Pickup-in-Store
 - Select a store?
 - Enter Other considerations?

5 Apply a Payment

5.1 Overview

- The Apply a Payment functions are similar to those described in the spec "*BF Admin Module Cart and Checkout.doc*"

5.2 Payment Method

- The initial display will offer the various payment methods:

apply a payment (WS10046)

Payment Method	
Balance Due:	\$59.36
Pick One:	<div><input type="radio"/> Credit Card, use card on file <input type="radio"/> Credit Card, enter a new card <input type="radio"/> Offline Payment, Check, Cash or Money Order</div>

5.3 Credit Card, use card on file

- See spec "*BF Admin Module Cart and Checkout.doc*" for details

5.4 Credit Card, enter a new card

- See spec "*BF Admin Module Cart and Checkout.doc*" for details

Payment Method	
Balance Due:	\$59.36
Pick One:	<div><input type="radio"/> Credit Card, use card on file <input checked="" type="radio"/> Credit Card, enter a new card <input type="radio"/> Offline Payment, Check, Cash or Money Order</div>
* Card Type:	<input type="text" value="Drop Down"/>
* Card Number:	<input type="text" value="Entry-field"/>
* Expiration month:	<input type="text" value="Drop Down"/>
* Expiration year:	<input type="text" value="Drop Down"/>
* Verification:	<input type="text" value="Entry-field"/>

5.5 Offline Payment, Check, Cash or Money Order

Payment Method	
Balance Due:	\$59.36
Pick One:	<div><input type="radio"/> Credit Card, use card on file <input type="radio"/> Credit Card, enter a new card <input checked="" type="radio"/> Offline Payment, Check, Cash or Money Order</div>
* Offline Payment:	Select One ... [drop-down]
* Amount Paid:	59.36
* Reference:	

- The Offline Payment drop-down will be populated with the following values from the PAYMENT_METHOD_TYPE entity:

Drop Down Value	Payment Method Type ID
Cash	CASH
Certified Check	CERTIFIED_CHECK
Company Account	COMPANY_ACCOUNT
Company Check	COMPANY_CHECK
Money Order	MONEY_ORDER
Personal Check	PERSONAL_CHECK

- Validation:
 - Offline Payment
"One Offline Payment option must be selected from the drop down"
 - Amount Paid
"The Amount Paid is required, it must be greater than zero and cannot exceed the Balance Due"
 - Reference
"The Reference is required, it should reflect the Check#, Money Order# or a Cash reference"

5.6 Technical Notes

- The Apply Payment section is used to settle an order
- Credit Card Payment Method
 - Call service 'addPaymentMethodToOrder'
 - This service will create a new ORDER_PAYMENT_PREFERENCE and "AUTHORIZE" the payment preference according to Credit Card Payment gateway settings.

- AUTHORIZED
 - Call service 'captureOrderPayments'
 - This service will "CAPTURE" the order payment preference according to Credit Card Payment Gateway settings
- NOT_AUTHORIZED
 - Message "Please check your credit card details, we were unable to process your payment"
- Offline Payment, Check, Cash or Money Order
 - Call service 'receiveOfflinePayment'
 - This service will create new ORDER_PAYMENT_PREFERENCE and PAYMENT in a status of "PAYMENT RECEIVED"

6 PDF Export

- the PDF version should mimic the Order Detail screen
 - Including ALL orders in the list
 - Will generate a single PDF output file
 - One page per order (guideline for format is the Order Detail section)
 - Change status to "Exported" for each order
 - The credit card number should be included in full
 - some customers may not have a proper merchant account setup for whatever reason so they will process the cc offline
- File name should be in "Order-From to Order-To.pdf" format. Examples:
 - "WS10009 to WS10048.pdf"
 - "WS10157 to WS10157.pdf"
- The ORDER_HEADER_ATTRIBUTE should be updated to reflect the export
 - IS_DOWNLOADED set to "Y"
 - DATETIME_DOWNLOADED set to current system date/time

7 Change Order

7.1 Overview

- The Change Order page will allow for various modifications:
 - Orders can be Completed (Shipped)
 - Orders can be Cancelled
 - Returns can be processed
- Orders can be manipulated at an Order or Item level

From Status	To Status	Other Considerations
Approved	Completed (Shipped)	Will track Shipping information
Approved	Cancelled	Consider Credit Card refund
Approved	Change Qty	Consider Credit Card adjustments
Completed	Product Returns	Consider Credit Card refund

7.2 Adjusting BF-Inventory

- Inventory adjustments are only required if the system parameter INVENTORY_METHOD is equal to "BIGFISH"
- The product attributes "BF_INVENTORY_TOT" and "BF_INVENTORY_WHS" should be adjusted
 - BF_INVENTORY_TOT is always adjusted
 - BF_INVENTORY_WHS is only adjusted if the Order attribute "DELIVERY_OPTION" is set to "SHIP_TO"
 - In other words, Pick-Up-In-Store orders do NOT adjust the warehouse inventory on Order status change
- This should consider virtual/variant configurations and the fact that more than one item of the same variant can be purchased
- The only Change Order action that impacts Inventory is a Status Change from "Approved" to "Cancelled"
 - Inventory should be INCREASED, by the Qty for each relevant Product
- See *BF-Cart-and-CheckOut* spec for details on inventory reductions on Order completion

7.3 Visual Guideline

change order (WS10046)

Order WS10046 Information

Store: XYZ

Standard Order Information Box

Status Change

Action:

- ☐ Cancel an Order
- ☐ Change Ordered Qty
- ☐ Complete (Ship) an Order
- ☐ Product Returns

Helper-1

Helper-2

Note: This is a note

Order Items

<input type="checkbox"/>	Item Seq#	Product#	Product Name	Item Status	Order Qty	Item Price	Returned Qty	Shipped Qty	Ship Qty	New Qty
<input type="checkbox"/>	<u>0001</u>	<u>10011</u>	Emma	Completed	1	\$190.00	0	0	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<u>0002</u>	<u>10023</u>	Helen	Approved	1	\$54.23	0	0	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	<u>0003</u>	<u>10056</u>	Susan	Completed	3	\$99.99	0	0	<input type="text"/>	<input type="text"/>

Shipping Groups

<input type="checkbox"/>	Seq#	Product#	Product Name	Item Status	Order Qty	Item Price	Shipped Qty	Ship Qty
Ship Group: 00001 Ship To: 220 Old Country Road, Mineola, NY 11501								
<input type="checkbox"/>	<u>0001</u>	<u>10011</u>	Rose	Approved	1	\$69.95	0	<input type="text"/>
Ship Group: 00002 Ship To: 17 Sunshine Road, Miami, FL 32230								
<input type="checkbox"/>	<u>0002</u>	<u>10011</u>	Rose	Approved	1	\$69.95	0	<input type="text"/>
Ship Group: 00003 Ship To: 1784 17th Street, New York, NY 10021								
<input type="checkbox"/>	<u>0003</u>	<u>10011</u>	Rose	Approved	1	\$69.95	0	<input type="text"/>

Financial Adjustments

See Processing Below

Back

Save



- Order Items or Shipping Groups component
 - Shipping Groups will be displayed IF:

- The Action is "Complete (Ship) and Order" AND
- There are multiple Shipping Groups

7.4 **Technical Notes: OFBiz Mapping**

UI Component	OFBiz Mapping
Item Seq#	ORDER_ITEM.SEQUENCE_NUM
Product#	ORDER_ITEM.PRODUCT_ID
Product Name	PRODUCT.PRODUCT_NAME
Item Status	ORDER_ITEM.STATUS_ID
Order Qty	ORDER_ITEM.QUANTITY
Item Price	ORDER_ITEM.UNIT_PRICE
Returned Qty	RETURN_ITEM.RETURN_QUANTITY
Shipped Qty	ORDER_ITEM_SHIP_GROUP_ASSOC.QUANTITY

7.5 **Processing**

- Default settings and "Helper" buttons
 - If the Header status and ALL Items have a status of "Approved" then
 - Pre-select the "Complete (Ship) an Order"
 - Enable "Helper-1" with text "Quick Ship"
 - Enable "Helper-2" with text "Quick Cancel"
 - If the Header status and ALL Items have a status of "Completed" then
 - Pre-select the "Product Returns"
 - Enable "Helper-1" with text "Quick Return"
 - Hide "Helper-2"
 - The neither of the above conditions are true then:
 - "Action" will not have a default option checked
 - The "Helper" buttons are NOT be displayed
 - "Quick Ship"
 - Select the Action "Complete (Ship) Order"
 - Check all ITEM boxes
 - For all ITEMS, pre-fill the "Ship Qty" entry box to match "Order-Qty"
 - "Quick Return"
 - Select the Action "Product Returns"
 - Check all ITEM boxes
 - For all ITEMS, pre-fill the "Return Qty" entry box to match "Ship-Qty"
 - "Quick Cancel"
 - Select the Action "Cancel an Order"
 - Check all ITEM boxes

- The Order Items section will display appropriate attributes depending on the “Action” selected:

- Cancel an Order

<input type="checkbox"/>	Item Seq#	Product#	Product Name	Item Status	Order Qty	Item Price	Returned Qty	Shipped Qty
<input type="checkbox"/>	0002	10023	Helen	Approved	1	\$54.23	0	0

- Change Ordered Qty

<input type="checkbox"/>	Item Seq#	Product#	Product Name	Item Status	Order Qty	Item Price	Returned Qty	Shipped Qty	New Qty
<input type="checkbox"/>	0002	10023	Helen	Approved	1	\$54.23	0	0	

- Validation:
 - The entered New-Qty [NEW-QTY] must be a valid number

- Complete (Ship) an Order

<input type="checkbox"/>	Item Seq#	Product#	Product Name	Item Status	Order Qty	Item Price	Returned Qty	Shipped Qty	Ship Qty
	0001	10011	Emma	Completed	1	\$190.00	0	0	
<input type="checkbox"/>	0002	10023	Helen	Approved	1	\$54.23	0	0	
<input type="checkbox"/>	0003	10056	Susan	Approved	3	\$99.99	0	0	

- Validation:
 - The entered Ship-Qty [SHIP-QTY] cannot be greater than the Order-Qty [ORDER-QTY]

- Product Returns

<input type="checkbox"/>	Item Seq#	Product#	Product Name	Item Status	Order Qty	Item Price	Returned Qty	Shipped Qty	Return Qty
<input type="checkbox"/>	0001	10011	Emma	Completed	1	\$190.00	0	0	

- Validation:
 - Compute “Remaining Qty at Customer” as “Shipped-Qty” less “Return-Qty”
 - The entered Returning-Qty [RETURNING-QTY] cannot be greater than the Remaining-Qty-at-Customer [REMAINING-QTY-AT-CUSTOMER]

- The checkbox selector ☐ in the “header” will toggle all-selected and none-selected


- Item level CHECKBOX enablement rules




- The ability to select, using the checkbox, on the ITEM level depends on both the primary Action and the status of the Item

- Items that are not eligible for the specific action will NOT have a selectable checkbox available
- Rules are:

Action	Enabled ITEM checkbox if ITEM Status is equal to	Activate Entry Box
Cancel an Order	Approved	None
Changed Ordered Qty	Approved	New Qty
Complete (Ship) an Order	Approved	None
Product Returns	Completed	Returning Qty

- UI Example:

Status Change					
Action:		<input type="radio"/> Cancel an Order <input type="radio"/> Change Ordered Qty <input checked="" type="radio"/> Complete (Ship) an Order <input type="radio"/> Product Returns			
<input type="checkbox"/>	Item Seq#	Product#	Product Name	Item Status	Etc.
<input type="checkbox"/>	00001	10011	Emma	Completed	Etc.
	00002	10023	Helen	Approved	Etc.
<input type="checkbox"/>	00003	10056	Susan	Completed	Etc.

- The checkbox selector will either have a valid selector ☐ or an Info Icon 
 - An Info Icon  indicates that the action CANNOT be executed on that row
 - Standard Info  Messages (see below for more specific guidance)

An Item can only be CANCELLED if the status is APPROVED
 An Item can only be RETURNED if the status is COMPLETED
 An Item can only be COMPLETED if the status is APPROVED
 The Item Ordered-Qty can only be changed if the status is APPROVED

- Item level ENTRY FIELD enablement rules

- The ability to enter a New-Qty, Ship-Qty or a Return-Qty depends on the Action and the Item Status
- The rules are the same as the CHECKBOX enablement above
- UI Example:

Status Change					
Action:		<input type="radio"/> Cancel an Order <input type="radio"/> Change Ordered Qty <input type="radio"/> Complete (Ship) an Order <input checked="" type="radio"/> Product Returns			

<input type="checkbox"/>	Etc.	Item Status	Order Qty	Returned Qty	Returning Qty	Return Reason
<input type="checkbox"/>	Etc.	Completed	1		<input type="text"/>	Drop-down
<input checked="" type="checkbox"/>	Etc.	Approved	1			
<input type="checkbox"/>	Etc.	Completed	3		<input type="text"/>	Drop-down


- Clicking on the Item Seq# will redirect to the Order Item Detail page
- Clicking on the Product# will redirect to the Product Detail page
- ITEM vs ORDER Status Code considerations
 - Status changes are always made at the ITEM level
 - If ALL the ITEMS are modified to the same status then processing needs to update the ORDER STATUS accordingly
 - For example:
 - two items were originally ordered by a customer
 - client has inventory to ship Item#1 but cannot yet ship Item#2
 - Item#1 is marked as "shipped"
 - Item#2 is marked as "shipped" at a later date
 - WHEN ITEM #2 IS "SHIPPED" – ALL ITEMS ARE SHIPPED – SO THE ORDER-STATUS NEEDS TO REFLECT THIS
- The "Note" should reflect all changes to status, as appropriate, with the user-entered note appended, as follows:

On [date] at [time], User [user-name], modified Order# [order-number]:

Status: From: [old-status] To: [new-status]
 Carrier: From: [old-carrier] To: [new-carrier]
 Tracking#: From: [old-track#] To: [new-track#]
 Ship Date: From: [old-date] To: [new-date]
 Manual Adj: [manual-adj-amount]
 Refund Amt: [refunded-amount]
 Comment: [entered-note]

- Only modified information should be reflected. For example, if the Tracking# was the only field modified then the Status, Carrier, and Ship-Date lines would not be generated.
 - For STORE_PICKUP orders the [old-carrier] or [new-carrier] data should read "STORE_PICKUP".
- The entered "Note" is added to the ORDER_HEADER_NOTE and ORDER_HEADER_NOTE_VIEW tables (see section Order-Note-Detail for mapping and additional details)

7.6 **Product Returns enablement rules**

- Checkbox is disabled if:
 - "Order Qty" is not less than "Returned Qty"
- Info Message : "All items have already been returned in previous actions"


- OR product is NOT returnable (PRODUCT.RETURNABLE = "N")
Info Message ⓘ: "This Product is marked as NOT Returnable"
- UI Example:

<input type="checkbox"/>	Etc.	Item Status	Order Qty	Returned Qty	Returning Qty	Return Reason
<input checked="" type="checkbox"/>	Etc.	Completed	1	1		
<input checked="" type="checkbox"/>	Etc.	Approved	1			
<input type="checkbox"/>	Etc.	Completed	3		<input type="text"/>	Drop-down

7.7 "Complete (Ship) an Order"

- Additional attributes may be entered when Completing an Order:
 - Carrier
 - Tracking#
 - Ship-Date
 - Package Weight
 - Package Width
 - Package Height
 - Package Depth
- "Carrier", "Tracking Number" are optional fields.
 - For a Pick-Up-In-Store order these will not be available for entry
- "Carrier" is a combination of Carrier + Shipping Method. Values are populated from the PRODUCT_STORE_SHIPMENT_METH entity. Examples:
 - UPS, Ground
 - UPS, Next Day
 - Fedex, Air
 - US Post Office, 2nd Day
- The "Ship Date:" caption should be read "Pick Up Date:" for an Order that has the "DELIVERY_OPTION" attribute set to "STORE_PICKUP"
- Package Weight
 - is optional
 - the "uom" indicator (Kgs in the example below) is a display of the system parameter WEIGHT_UOM_DEFAULT
- Package Height, Width, Depth
 - is optional
 - the "uom" indicator (Kgs in the example below) is a display of the system parameter LENGTH_UOM_DEFAULT
- When saving items to ORDER_ITEM_SHIP_GROUP the Carrier + Shipping-Method are stored as separate attributes
- Generate Ship Label?

- On SAVE, if checked as "Yes" then generate a Shipping Label in a new popup-window
- Save processing should then proceed as normal

Status Change		Quick Action
Action:	<input type="radio"/> Cancel an Order <input type="radio"/> Change Ordered Qty <input type="radio"/> Complete (Ship) an Order <input type="radio"/> Product Returns	
Carrier:	Drop-Down	
Tracking#:	USPS-987-9998888	
Ship Date:	12/3/11 	[WARNING]
Generate Ship Label?	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Package Weight:	<input type="text"/> kg	
Package Height:	<input type="text"/> cm	
Package Width:	<input type="text"/> cm	
Package Depth:	<input type="text"/> cm	
Note:	This is a note	

■ Technical Notes:

- The "package" information is stored in the SHIPMENT_PACKAGE entity

Attribute
SHIPMENT ID
SHIPMENT_PACKAGE_SEQUENCE_ID
SHIPMENT_BOX_TYPE_ID
DATE_CREATED
BOX_LENGTH
BOX_HEIGHT
BOX_WIDTH
DIMENSIONS_UOM_ID
WEIGHT
WEIGHT_UOM_ID
INSURED_VALUE

- **FUTURE ENHANCEMENT:** The concept of having a pre-defining package is also available. The BOX_TYPE_ID is associated with a Carrier and can contain standard details about packages that are used often. This is maintained in entities SHIPMENT_BOX_TYPE and CARRIER_SHIPMENT_BOX_TYPE

7.8 Validation

- Ship-Date is required when the new status is "Completed"
 - Message: "A Ship Date is required when changing the status to Completed"

7.9 Warnings

- Ship Date: if in the future display:
"WARNING: Ship-Date is in the future"
- For implementation notes refer to spec "*BF Admin Module General.doc*", specifically the "Inline / Dynamic Warnings" section

7.10 Button Action

- Save: store changes to the database
 - The standard message should be returned to the List Screen
"You have successfully saved the ORDER STATUS change"
 - If the client has implemented "Ratings & Reviews" (REVIEW_ACTIVE_FLAG = TRUE) and the new status is "COMPLETED" then the message returned should be:
"You have successfully saved the ORDER STATUS change. A review email may be sent to [email-address] in [n] days"

8 Financial Adjustments

8.1 Overview

- The "Financial Adjustments" component will be displayed for the following actions:
 - "Cancel an Order"
 - "Change Qty"
 - "Product Returns"
- The "Financial Adjustments" component will refresh dynamically as information is modified in the main screen
- The sections of this component are as follows:
 - Original Charge: this shows details of the original eCommerce purchase
 - Prior Adjustments for this Order: this reflects any previous refunds or adjustments made against this order
 - If there are no Prior Adjustments then this section should NOT be displayed
 - Remaining Order: this should reflect how the Order would appear given any prior adjustments and changes being made in this function
 - Financial Adjustment: is the difference between the Adjusted Total Charge (or the Original Charge if there are no prior adjustments) and the New Order total

8.2 UI Example (Simple Cancel)

- **NOTE: Nick 1/28/2014: need to modify this section to mimic the Return processing below. UI should be the same for a Cancel or Return**
- Original Order

Product	Qty	Unit Price	Total Price
Item-1	3	\$10.00	\$30.00
Item-2	10	\$20.00	\$200.00
Item-3	4	\$13.00	\$52.00
Sub-Total			\$282.00
TAX	10%		\$28.20
PROMO	5% Off		(\$14.10)
SHIPPING	Flat Rate		\$15.00
ORDER TOTAL			\$311.10

- Cancelling an Order

Financial Summary	
Original Charge made on 1/1/13	
Total For Items:	\$282.00

Promo:	(\$14.10)
Shipping:	\$15.00
Tax:	\$28.20
Adjustments:	\$0.00
Total Charge:	\$311.11
Financial Adjustment	
Total Item Adjust:	(\$282.00)
Promo:	\$14.10
Shipping:	(\$15.00)
Tax:	(\$28.20)
TOTAL ADJUSTMENT:	(\$311.10)
Misc Financial Adjustment	
Description:	Amount:
<input type="text"/>	<input type="text"/>

Back

Cancel Order

- Where:

Total For Items
Promo

OrderItem.unitPrice * OrderItem.quantity
Include Promo amount for both Order-Header
and Order-Item levels

Shipping

Include Shipping amount for both Order-Header
and Order-Item levels

Tax

Include Tax amount for both Order-Header and
Order-Item levels

Adjustments

Include Other Adjustments for both Order-
Header and Order-Item Levels

8.3 UI Example (Returns)

■ Original Order

Product	Qty	Unit Price	Total Price
Item-1	3	\$10.00	\$30.00
Item-2	10	\$20.00	\$200.00
Item-3	4	\$13.00	\$52.00
Sub-Total			\$282.00
TAX	10%		\$28.20
PROMO	5% Off		(\$14.10)
SHIPPING	Flat Rate		\$15.00
ORDER TOTAL			\$311.10

■ Shipping Assumptions

- Assume that Item-1 and Item-3 were shipped to the customer
- Item-2 is on back-order and has not yet been shipped

■ Historical Return

- Assume 2 Qty of Item-1 were Returned and processed
- The adjustments made were:

Returned Product	Qty	Unit Price	Total Return
Item-1	2	\$10.00	(\$30.00)
Sub-Total			(\$30.00)
TAX	10%		(\$3.00)
PROMO	5% Off		\$1.50
SHIPPING	Shipping Not Refunded		\$0.00
REFUND TOTAL			(\$31.50)

■ Subsequent Return

- Assume the following Returns are now being processed:
 - 1 Qty of Item-1
 - 2 Qty of Item-3

<input type="checkbox"/>	Etc.	Item Status	Order Qty	Returned Qty	Returning Qty	Return Reason
<input checked="" type="checkbox"/>	Item1	Completed	3	2	1	Drop-down
<input checked="" type="checkbox"/>	Item2	Approved	10			
<input checked="" type="checkbox"/>	Item3	Completed	4		2	Drop-down

Financial Summary

Original Charge made on 1/1/13

Total For Items: \$282.00
 Promo [FIVEOFF]: (\$14.10)
 Shipping: \$15.00
 Tax 10%: \$28.20
 Adjustments: \$0.00
 Total Charge: **\$311.11**

Prior Adjustments

Prior Item Adjust: (\$30.00)
 Promo Adjust: \$1.50
 Shipping Adjust: \$0.00
 Tax Adjust: (\$3.00)
 Misc Adjust [Description]: \$0.00
 Adjusted Charge: **(\$31.50)**

Financial Adjustments

Item Seq#	Product#	Item Price	Qty Adj	Price Adj
0001	Item-1	\$10.00	-1	(\$10.00)
0003	Item-3	\$13.00	-2	(\$26.00)

Calculated Financial Adjustment

Tax:	<input type="checkbox"/> Include	<input type="text" value="-28.20"/>
Promo:	<input type="checkbox"/> Include	<input type="text" value="14.10"/>
Shipping:	<input type="checkbox"/> Include	<input type="text" value="-15.00"/>

Misc Financial Adjustment	
Description:	Amount:
<input type="text"/>	<input type="text"/>

Back

Process Returns

■ Financial Adjustments (TODO)

- Item level displays include all item details (item price, item total, offer price, offer total). CONSIDER: displaying all item level info, including adjustments in this section, eg:

Item: 0001 Product: #1 Price: \$100 Qty: -1 Adjust: -\$100
 Item: 0001 Product: Promo Price: -\$9.00 Qty: -1 Adjust: \$9

- Calculated Financial Adjustment contains information applied to the entire Order

■ Validation

- Total Refunded (from Cancel or Return) cannot exceed the original charge
 "Total Order Refunded [Total-Refund-Amount] cannot exceed Original Total Charge"
- Total Refunded Amount (from Cancel or Return) cannot be less than zero
 "Total Order Refunded [Total-Refund-Amount] cannot be less than zero"

8.4 UI Example (Change Qty)

■ TODO

8.5 Technical Notes

■ Entities used for Status Change:

- ORDER_STATUS
- STATUS_VALID_CHANGE
- ORDER_ITEM_SHIP_GROUP
- ORDER_HEADER_NOTE
- NOTE_DATA

■ Services:

- changeOrderStatus
- updateOrderItemShipGroup
- createOrderNote

■ New Status Drop Down:

- Populated based on entity 'STATUS_VALID_CHANGE'
- Select STATUS_VALID_CHANGE.STATUS_ID_TO by the 'current' status.

■ Refund Process Flow

- Create the Return Header and Return Items
 - Service: createReturnAndItemOrAdjustment
 - Return Header Type: CUSTOMER_RETURN
 - Payment Method Id: The same payment method used on the original order (CC) (ORDER_PAYMENT_PREFERENCE)
- Accept The Return
 - Service: updateReturnHeader
 - Status Id: RETURN_ACCEPTED
- Receive The return
 - Service: updateReturnHeader
 - Status Id: RETURN_RECEIVED
- Complete The Return
 - Service: updateReturnHeader
 - Status Id: RETURN_COMPLETED
- Cancel Item Process Flow
 - Set Order Item
 - StatusId:ITEM_CANCELLED
 - Cancelled Quantity
 - Misc Financial Adjustment
 - ORDER_ADJUSTMENT
 - ORDER_ADJUSTMENT.ORDER_ADJUSTMENT_TYPE_ID='FEE'
 - Description:ORDER_ADJUSTMENT.DESCRPTION
 - Amount: ORDER_ADJUSTMENT.AMOUNT
- Refund Order Item Payment
 - Service: refundPayment
 - Payment Method Id: The same payment method used on the original order (CC) (ORDER_PAYMENT_PREFERENCE)
 - Refund Amount: Cancelled quantity * unit price
 - Misc Financial Adjustment
 - RETURN_ADJUSTMENT
 - RETURN_ADJUSTMENT.RETURN_ADJUSTMENT_TYPE_ID='RET_MAN_ADJ'
 - Description:RETURN_ADJUSTMENT.DESCRPTION
 - Amount: RETURN_ADJUSTMENT.AMOUNT

8.6 Future Considerations

- OFBiz offers the following status codes:
 - ORDER_APPROVED
 - ORDER_CANCELLED
 - ORDER_COMPLETED
 - ORDER_CREATED
 - ORDER_HOLD
 - ORDER_PROCESSING
 - ORDER_REJECTED
 - ORDER_SENT (could be used as "SHIPPED" before "COMPLETED")

9 Order Shipping Details

9.1 Overview


- Accessed from:
 - Order Detail page, showing ALL Shipments
 - Order Item Detail page, showing a single Shipment


9.2 UI Guideline

order shipping details (WS10046)

Order WS10046 Information	Store: XYZ
Standard Order Information Box	

Shipping Group# 00001	
Ship Group#:	00001
Ship Date:	12/07/2010
Ship Method:	USPS Next Day
Tracking#:	USPS-10006-B17
Address:	220 Old Country Rd, Mineola, NY 11501
Ship Instructions:	Cross streets are 34 th and 8 th Avenue. If you cannot get access to my apartment then check with the caretaker. They are in apartment #117 on the 9 th floor. Use the elevator, click 9, second on the left. Thanks!

Order Shipment# 00001			
Status:	Shipped 	Height:	12 in
Return#:	00001	Width:	8 in
		Weight:	0.80 kgs
		Depth:	24 in
Item#	Product Name	Item Price	Qty
IT001-A:	Button Down Shirt	\$79.99	3


Order Shipment# 00002			
Status:	Shipped 		
Item#	Product Name	Item Price	Qty
IT987-Z	V-Neck Sweater	\$139.99	1

Shipping Group# 00002	
Etc...	

9.3 Processing

- OFBiz Mapping
 - "Shipping Group"
 - ORDER_ITEM_SHIP_GROUP

- "Order Shipment"
 - SHIPMENT
 - SHIPMENT_ITEM
 - SHIPMENT_PACKAGE
- Hide if blank
 - Package details if all 4 are blank
 - Return#

Icon	Hover Tooltip	Click Action
	Show Tracking Info	Display the Carrier's tracking information (UPS, Fedex etc) in a Popup window
	Generate Shipping Label	Generate the Shipping label in a pop-up label For a "BlueDart" implementation the Shipping label details are defined in the spec " <u><i>BF BlueDart Integration.doc</i></u> "

10 Order Item Detail

10.1 Overview

- This page is accessed from a direct link on the Item Seq# in screens that show Order Items
- Regardless of which Seq# is clicked, this page will display ALL Order Items for a specific order

10.2 Visual Guideline

order item details (WS10046)

Order WS10046 Information	Store: XYZ
Standard Order Information Box	

Order Item Seq# 00001			
Item Seq#:	00001	QUANTITY	
Product#:	100006	Ordered:	10
Product Name:	Button Down Shirt	Cancelled:	1
Item Status:	Completed	Picked:	9 [see pick list]
		Packed:	9 [see packing details]
List Price:	\$199.00	Returned:	2 [see returns]
Sales Price:	\$235.00		
Adjustments:	\$0.00	Ship Group:	9 [Shipping Groups]
Sub Total:	\$2115.00	Shipment Planned:	9 [10004-0001]
		Shipment Issued:	9 [10004-0001]
Notes			
On 04/01/2013 at 2:18PM, User admin, modified Order# WS10010:			
Status: From: Approved To: Completed			
Tracking#: From: To: 123456			
Ship Date: From: To: 04/01/2013			
Another Note ...			
Order Item Attributes			
Attribute	Value		
GIFT_MSG_FROM_01	John		
GIFT_MSG_TO_01	Mary		
GIFT_MSG_TEXT_01	Happy Birthday!		

Order Item Seq# 00002
Etc.

Items Sub Total:	\$2115.00
Promotion (DOLLAROFF):	(\$1.00)
Shipping and Handling:	\$10.00

Sales Tax (6.125%):	\$130.14
Adjustments:	\$0.00
Order Total:	\$2254.14

Back

[toolbar icons]

10.3 Processing

- Shipping Information
 - This section is only displayed for COMPLETE orders and there is information available
- Link Actions
 - [See Pick List]: TODO
 - [See Packing Details]: TODO
 - [See Returns]: TODO
 - [Ship Group Details]: TODO
 - [Planning Shipment Details]: TODO
 - [Issued Shipment Details]: TODO
 - See Carrier's Shipping Detail

10.4 Carrier's Tracking Detail

- This will provide details of the shipment from the Carrier's website
- Details are to be displayed in a window "pop-up"
- The Icon will only be displayed if the Carrier Tracking URL exists
 - Attribute: CARRIER_PARTY.PARTY_CONTENT_TYPE = TRACKING_URL
- The URL will contain a reference to the Tracking Number
 - This will be \${TRACKING_NUMBER}
 - And will be replaced with the actual Tracking Number on file
 - Example: is replaced with the actual Carrier's tracking number.

Carrier Tracking URL:

[www.usps.com/tracking/number=\\${TRACKING_NUMBER}](http://www.usps.com/tracking/number=${TRACKING_NUMBER})

Actual executed URL:

www.usps.com/tracking/number=12345

- Specific Carrier Tracking Url's

UPS	http://www.ups.com/pes/?loc=en_US&trackNums=\${TRACKING_NUMBER}
USPS	https://tools.usps.com/go/TrackConfirmAction_input?tLabels=\${TRACKING_NUMBER}
Fedex	https://www.fedex.com/fedextrack/?tracknumbers==\${TRACKING_NUMBER}

10.5 Order Item Attributes



- This is a simple display of the entity ORDER_ITEM_ATTRIBUTE
 - Attribute: ORDER_ITEM_ATTRIBUTE.ATTR_NAME
 - Value: ORDER_ITEM_ATTRIBUTE.ATTR_VALUE

11 Order Notes

11.1 Note List UI Guideline

order notes (WS10046)

Order WS10046 Information	Store: XYZ
Standard Order Information Box	

Order WS10046 Notes				
Note#	By	Date	Time	Note
<u>10011</u>	nrosser	01/09/12	1:00pm	Complete Order Shipment
<u>10023</u>	dagarwal	01/07/12	3:00pm	Order Items confirmed after discussion with Customer
<u>10011</u>	lshein	12/31/11	Complete	Pending receipt of inventory before I can complete this Order
Back Add				 

11.2 Processing

- Similar concept to adding Customer Notes (see *BF-Admin-Module-Customers*)
- OFBiz mapping:
 - Extract from entities ORDER_HEADER_NOTE and NOTE_DATA
 - Note# ORDER_HEADER_NOTE.NOTE_ID, NOTE_DATA.NOTE_ID
 - By NOTE_DATA.NOTE_PARTY
 - Date NOTE_DATA.LAST_UPDATE_STAMP (date)
 - Time NOTE_DATA.LAST_UPDATE_STAMP (time)
 - Note NOTE_DATA.NOTE_INFO
- Accessed in either "edit" or "add" mode

11.3 Note Detail UI Guideline

order note detail (WS10046)

Order WS10046 Information	Store: XYZ
Standard Order Information Box	

Note	
Note#:	10099
Added By:	lshein
Date:	12/3/11
Time:	11:37am
Note:	<div></div>

Back

Save





- Validation
 - Note cannot be blank

12 Status Update History

12.1 UI Guideline

status update history

Order WS10046 Information	Store: XYZ
Standard Order Information Box	

Status Updates for WS100041								
Date	Time	Status ID	Item Seq ID	Product#	Item#	Product Name	Pmt Pref ID	User Login
4/11/12	2:24am	ITEM_CREATED	0001	10011	EK63	Emma		a@a.com
4/11/12	2:24am	PMT_NOT_AUTH					11785	a@a.com
4/11/12	2:24am	PMT_AUTH					11785	a@a.com
4/11/12	2:24am	ORD_APPROVED						a@a.com
4/11/12	2:24am	ITEM_APPROVED	0001	10011	EK63	Emma		a@a.com
4/11/12	2:24am	PMT_SETTLED					11785	a@a.com
4/16/12	3:15pm	ITEM_COMPLETE	0001	10011	EK63	Emma		admin
<div>Back</div> <div></div>								

12.2 Processing

- Most attributes are retrieved directly from the ORDER_STATUS entity
- Product#, Item# and Product Name are derived in the same way as the Order Detail page
 - Use the ORDER_STATUS.ORDER_ITEM_SEQ_ID to join to ORDER_ITEM.
 - Use the ORDER_ITEM.PRODUCT_ID to retrieve the Product information
- Pmt Pref ID
 - Links to the Payment Detail Page, passing the ORDER_PAYMENT_PREFERENCE_ID

13 Payment Detail Page

13.1 Top Section

payment detail

Order WS10046 Information	Store: XYZ
Standard Order Information Box	

Summary					
Date	Time	Payment Type	Amount	Status	Created By
4/11/12	2:24pm	Credit Card (Visa)	\$100.00	Settled	customer@somewhere.com
4/11/12	2:25pm	Gift Card	\$100.00	Settled	customer@somewhere.com
4/11/12	2:26pm	Cash On Delivery	\$253.05	Not Received	admin@client.com
4/30/12	3:00pm	Cash	\$50.00	Received	admin@client.com
4/30/12	3:05pm	Check	\$50.00	Received	admin@client.com




- The "Top Section" will be a standard display that will show the Standard Order Information Box and a summary list of Payments on file for this Order
- Technical Notes:
 - ORDER_PAYMENT_PREFERENCE is used to populate this table
 - For the "Payment Type" descriptive text use entity PAYMENT_METHOD_TYPE
 - For the "Status" descriptive text use entity STATUS_ITEM

13.2 Collapsed Payment Details



- For each Payment, a "collapsed" Payment Detail component will be offered
 - If there is only one Payment Detail component available, then automatically "Expand" to show the underlying details
- If accessed from another screen where a specific Payment identifier has been passed then "expand" this specific payment
- Note: the collapse / expand technique is the same as that used in the Catalog section of viewing and maintaining Images
 - See spec "[BF Admin Module Catalog.doc](#)" for more information

4/11/12 2:24pm	Credit Card	\$100.00	Settled	
----------------	-------------	----------	---------	---

4/11/12 2:25pm	Gift Card	\$100.00	Settled	
----------------	-----------	----------	---------	---

4/11/12 2:26pm	Cash On Delivery	\$235.05	Not Received	
4/30/12 3:00pm	Cash	\$50.00	Received	
4/30/12 3:05pm	Check	\$50.00	Received	

13.3 Expanding a Payment Detail

- Clicking on the expand icon , will expand the Payment Detail component to show the underlying details
- Any Expanded component will show the collapse icon  in the top right
- The UI guideline below shows all possible combinations
 - See the "Processing" section for an indication as to which "boxes" are displayed depending on the Payment Type
- All data in these sections is shown "as is" (simple database retrieval)
 - any descriptive text decoded from ENUMERATION or other lookup entities will be shown in parenthesis (see Technical Notes below)

4/11/12 2:24pm	Credit Card	\$100.00	Settled	
Credit Card Details				
Amount: 159.59 Payment Method ID: 11785 Card Type: CCT_VISA (Visa) Number: *1111 Valid From Date: Expire Date: 04/2013 Issue Number: Company Name On Card: Title On Card: First Name On Card: Veena Middle Name On Card: Last Name On Card: Singh Suffix On Card: Consecutive Failed Auths: Last Failed Auth Date: Consecutive Failed NSF: Last Failed NSF Date:				
Pay Pal Details				
Amount: 159.59 Payment Method ID: 10282 Payer ID: UE8TSNN6AZH24 Express Checkout Token: EC-5T448937U7229594G Payer Status: verified				

AVS Addr: verified
AVS Zip:
Correlation ID:
Transaction ID: O-4JL96049C81126615

Gift Card Details

Amount: 159.59
Payment Method ID: 11785
Card Number: 1111-AAA-89
PIN Number: 1111-AAA-89
Expire Date: 04/2013

EFT Payment Details

TBD: Future requirement

Order Payment Preference

Preference ID: 11785
Payment Method Type ID: CREDIT_CARD (Credit Card)
Max Amount: 159.59
Processing Attempts: 1
Status ID: PAYMENT_SETTLED (Settled)
Created By User Login: jyotilorish@yahoo.com
Present Flag: N
Swiped Flag: N
Overflow Flag: Y
Process Attempt: 1
Billing Postal Code:
Manual Auth Code:
Manual Ref Num:
Needs NSF Retry: N

Payment

Amount: 159.45
Payment ID: 10485
Payment Type ID: CUSTOMER_PAYMENT (Customer Payment)
Payment Method Type ID: CREDIT_CARD (Credit Card)
Status ID: PMNT_RECEIVED (Received)
Payment Ref Num: 1351768934326
Currency: USD
Comments:

Payment Gateway Response

Amount: 159.45
Gateway Response ID: 11831
Service Type Enum ID: PRDS_PAY_AUTH (Payment Authorization Service)
Trans Code Enum ID: PGT_AUTH (Authorize)
Currency: USD
Reference Number: 1351768934326
Alt Reference Number: 1351768934326
Sub Reference Number:

Gateway Code:
 Gateway Flag: C
 Gateway AVS Result:
 Gateway CV Result:
 Gateway Score Result:
 Gateway Message: This is a test authorization
 Transaction Date: 2012-11-01 07:22:14.000
 Result Declined:
 Result NSF:
 Result Bad Expire:
 Result Bad Card Number:

Payment Gateway Response

For multiple Payment-Gateway-Response items repeat display for each entry

13.4 Processing

- The Payment Details “boxes” will display various information depending on the Type of payment made:

Credit Card: Credit Card Details
 Order Payment Preference
 Payment
 Payment Gateway Response
 Gift Card: Gift Card Details
 Order Payment Preference
 Payment
 Payment Gateway Response
 Pay Pal: Pay Pal Details
 Order Payment Preference
 Payment
 Payment Gateway Response
 COD / Check / Cash: Order Payment Preference

13.5 Technical Notes

- OFBiz Mapping:

Section	OFBiz Entity
Credit Card	CREDIT_CARD
Gift Card	GIFT_CARD
Pay Pal Payment	PAY_PAL_PAYMENT_METHOD
Order Payment Preference	ORDER_PAYMENT_PREFERENCE
Payment	PAYMENT
Payment Gateway	PAYMENT_GATEWAY

- The displays will show the actual stored codes and a descriptive text shown in parenthesis, as appropriate:

Credit Card Details

Card Type (e.g. CCT_VISA)	Translate using the ENUMERATION entity where ENUM_TYPE_ID = "CREDIT_CARD_TYPE"
------------------------------	---

Order Payment Preference	
Payment Method Type (e.g. CREDIT_CARD)	Translate using the PAYMENT_METHOD_TYPE entity

Payment	
Payment Type ID (e.g. CUSTOMER_PAYMENT)	Translate using the PAYMENT_TYPE entity
Payment Method Type ID (e.g. CREDIT_CARD)	Translate using the PAYMENT_METHOD_TYPE entity
Status ID (e.g. PMNT_RECEIVED)	Translate using STATUS_ITEM

Payment Gateway Response	
Service Type Enum ID (e.g. PRDS_PAY_AUTH)	Translate using the ENUMERATION entity where ENUM_TYPE_ID = "PRDS_PAYSrv"
Trans Code Enum ID (e.g. PGT_AUTHORIZE)	Translate using the ENUMERATION entity where ENUM_TYPE_ID = "PGT_CODE"

14 Order Status Summary

14.1 UI Guideline

order status summary

Order Status Summary	
Status	Order Count
Created	78
Approved	66
Processing	77
Sent	98
TOTAL	324
Back	

14.2 Processing

- Simple summary of all status codes in the ORDER_HEADER entity
- Description should be retrieved from the STATUS_ITEM entity
- Sample SQL:

```
SELECT      SI.DESCRPTION, COUNT(*)
FROM        ORDER_HEADER OH,
            STATUS_ITEM SI
WHERE       OH.STATUS_ID = SI.STATUS_ID
AND         STATUS_TYPE_ID = "ORDER_STATUS"
GROUP BY    SI.DESCRPTION
```

- Clickable links are shown for all counts:
 - Do not show a link if the count is zero
 - It can be assumed that the number shown will be the number retrieved on the Order List page
 - Therefore, an appropriate Warning dialog box shown be displayed in the event that the number exceeds the allowable number
 - See usage of the system parameter ADM_WARN_LIST_ROWS in the spec "[BF Admin Module General.doc](#)")