IBM Sterling Call Center (next-generation)

Product concepts

The key components and features in the IBM® Sterling Call Center next-generation application that fulfills your business needs are defined here.

Products

A product is a unique identifier for the orders that are placed by customers.

When an order is placed by a customer, the products in the order contain a short description and an image. A product can belong to one of the following categories:

- Regular: These products are simple in nature. For example, football, book.
- Bundle: These products are logically grouped and represented by a parent product. The inventory is maintained for individual products. For example, a video game box that contains a set of CDs.
- Physical kit: These products are physically assembled products. The inventory is maintained for the parent product. For example, bouquet of flowers, a pre-configured computer.
- Product with variation: Products with variations are generically similar but different in attributes such as size or color. For example, shirts, shoes.

Typically, every product has certain related products that belong to one of the following types:

- Cross sell: This product is sold as an accessory or an add-on for the main product. For example, when a customer places an order for a mobile phone, you can inform the customer about the cross sell products such as a bluetooth headset that is available for the selected mobile phone model.
- Upsell: This product has a higher value than the main product. For example, a customer can place an order for a headphone with a cord. However, you can suggest that a cordless headphone or a bluetooth headphone is available.
- Supersession: This product is used to supersede an existing product when the original product has expired. For example, the latest software version is a good replacement for an older software version. Consider that a customer places an order for a product that is superseded by another product. In such cases, you can inform the customer that the requested product cannot be ordered currently and it is replaced with another product. You can then check whether the customer would like to purchase the new product.
- Competitive: This product has the same characteristics as the main product, but it is manufactured by a competitor of the original product. For example, A washing machine from manufacturer "A" can have the same features as a washing machine from a competitor "B" at a better price.
- Alternative: This product is similar to the main product but manufactured by a different brand. For example, television sets from manufacturer "A" and manufacturer "B" with same specifications.

You can browse for the products of customer's interest. If you see a long list of products, you can sort the products based on the item identifier, relevance, or description. You can identify a product by refining the search results based on the product categories and other attributes. You can also adjust the number of products that you want to view per page.

If a product is associated with related products such as cross-sell, up-sell, and so on, you can view the related products arranged accordingly.

You can provide the required information about a product, which includes the unit price, supported delivery methods, and whether the product is in stock or not. For products that can be picked up at a store, you can view the stores that sell the products and check their availability.

A bundle product can be fulfilled in different ways. The components in the bundle can be shipped together, shipped independently, or delivered together.

- Shipped Together: In this type of bundle product, all the components are shipped together. For example, a dining table set that contains a table and a set of 4 chairs.

- Shipped Independently: In this type of bundle product, the components are shipped independently. For example, a home theater system that includes a TV, DVD player, and speakers.
- Delivered Together: In this type of bundle product, the components can be shipped from different locations but are delivered together to the customer. For example, An aquarium that includes the fish and fish tank.

For a model product, you can inform the customer about the possible variants and help the customer to identify the correct product. For example, if the customer wants to buy a T-shirt, you can mention the colors and sizes of the T-shirt. The system validates whether a product is available for the given combination of attributes. If a variant is not available, you can provide other options.

Once you identify the product of customer's choice, you can select the product and view the complete details. You can view comprehensive information about products, which includes a brief overview and specifications. After you identify the products that the customer wants to purchase, you can directly add the products to an existing order or a new order.

Customers

An enterprise can have individual consumers or business organizations as customers.

Customer identification

When a customer wants to place an order, you can search and identify the appropriate customer record to associate with the order, or you can create a new customer profile.

You can create a consumer customer or a business customer, based on the permissions that are assigned to you.

Sometimes, customers might not want to provide their details. In such situations, you can skip the customer registration or customer identification. However, to fulfill the order, you must capture the billing and shipping addresses of the unregistered customers.

Customer management

You can search, view, create, and manage customer records. You can view the basic details of a customer, such as the name, status, and contact details.

If you want to know the ordering history of a customer, you can view the draft, confirmed, and return orders. You can also view the addresses, payment methods, and alerts that are associated with the customer. If you want to associate important information with a customer record, you can add notes. From the notes, you can gather information about the user who first contacted the customer and who later modified the customer record. You can also know the exact date and time when the notes were created or modified. Also, you can filter to view the required notes or delete unnecessary notes.

You can add multiple addresses for a contact and set a default address for the customer. You can add payment methods for the customer, which you can use when you want to collect payments for an order.

You can perform certain tasks that are related to a customer. For example, you can create a sales order or return order for a customer. When you create an order in the context of a customer, the customer details from the current context are used. Similarly, when you create a return order in the context of a customer, you can conveniently search and add only those products that the customer has purchased.

Orders

Sterling Order Management System Software involves managing product, customer, fulfillment, and payment details that are associated with the order.

Create orders

Customers can place orders for their required items.

If the customers request you to help them create the order, you can create the order for the customers.

- When you create an order for the customer, you can search for the customer if it is a registered customer, or you can create a customer in the application. If the customer prefers to create an order as a nonregistered customer, you can create the order without creating the customer profile. You must verify the customer details such as the shipping address, billing address, or the contact details that are used for creating the order.
- You can browse from the product catalog and select the items that the customer wants to order. You can also add bundle items and variant items to the order.
- You must capture the customer's requirements that are related to the delivery of the products.
  - If the customer prefers to pick up products from a store, you can change the fulfillment method to pickup.
  - If the customer specifies a date when the products must be delivered, you can choose an appropriate delivery option that caters to the customer's needs. If the products are not available for delivery on a specific date, you can suggest an alternative date and capture the customer's response.
  - If the customer wants to receive all the products in a single shipment or prefers the products to be shipped as soon as they are available, you can select the related optimization type.
  - If the customer wants to pick up products from a different store, you can view all the stores that are close to the customer's location and select the appropriate store.
- After the items are added, you can review the cart by confirming with the customer.
- You must capture the payments for the order. You can inform the customer, the amount that must be paid to fulfill the order and capture the payment methods that the customer wants to use to pay for the order. During this process, you can add, edit, or remove the payment methods. You can also save the payment methods to the customer profile.
- You can add or modify the charges or discounts for the ordered items while creating the order.
- You can also apply promotions, if any, during the entire order creation process.
- You can override the price and can add instructions, gift options, and notes during the order creation process.
- After you confirm the order details with the customer, you can complete the order creation process.

If you must suspend the order creation at some point, you can save the order as draft, and exit or can cancel and discard the order.

If you want to copy the order that you are creating, you can use the Copy order option, and all the order details are copied to a new order. For more information, see "Copy orders" on page 3.

Copy orders

You can save time by creating a copy of an existing order. You can also copy an order that is being created and a new order is created with the same order details.

The copy order template is used to determine the attributes that you want to copy from an order. You can customize this template based on your requirements.

You might copy an order in the following scenarios:

- While creating an order, you have added the customer details such as the name, contact details, billing address, and the shipping address. If you need to create multiple orders for the same customer, you can save a draft order with the basic customer details and then create a copy of that order, thus saving the time and effort in adding customer details repetitively. However, you must always confirm the customer details while creating an order for the customer.

- If a customer wants to place exactly the same order as they had placed earlier, you can copy the order.
- If a customer wants to place an order for a different variant of the same product, you can copy the order and then modify the product before you confirm the order.

Cancel orders

Customers place an order for products and might later decide not to buy a few products or cancel the entire order.

If the customers request you to help them cancel the order, you can cancel specific products in an order or cancel the entire order. If the products are already shipped, you can request for a stop delivery.

Order summary

The order summary page serves as a centralized location to manage the order.

You can find comprehensive information about the order in the order summary page and you can use this information to answer queries of your customers. You can manage orders by performing the order or order line actions.

You can share the order number, order total, and status with the customers for future reference. You can also view the pricing summary that includes a detailed breakup of the order total in terms of pricing, adjustments, shipping charges, and taxes.

The order summary page lists the products that are included in the order. Each product in the order is termed an as order line. You can view details of each order line to answer queries specific to a product in the order. For example, an order can comprise a bundled product. If the components in the bundle are shipped independently, a customer can have queries for the delivery of the components. In such situations, you can provide the shipment details of the components to the customer. If the customer has ordered related products along with the main product, you can also view the corresponding details.

Order status

Order status is the status of the order and is updated during the fulfillment journey of the order.

The order status is updated from creation of the order to the fulfillment of the order and can have different statuses such as canceled or partially shipped. Customers can have queries at any stage of the order. For example, a customer might want to know the status of a shipment or the delivery date of products. In such cases, you can track the shipments and answer the queries of the customers.

Notes

Order notes help you track the events in an order lifecycle. There can be system-generated notes for certain updates of the order and you can also add notes manually.

Notes are available for orders, order lines, and returns. You can add, edit, and delete notes. You can filter notes based on your requirement and can also refer to the notes in the future.

Order holds

Orders can be held back due to certain discrepancies. Holds are applied to orders when address verification fails, payments are not authorized, or in such other situations. You can apply holds to such orders, can view the history of the holds, and can also resolve holds.

When a customer inquires about the delay in processing the refunds, you can verify whether the return order is on hold. You can suggest ways that can help the customer take an appropriate action. You can then resolve the hold and process the returns.

When a customer inquires about the delay in processing the order, you can verify whether the order is on hold. You can suggest ways that can help the customer take an appropriate action. You can then resolve the hold and process the order.

When an order is placed on hold, alerts might be created to remind you that a transaction needs manual intervention. If you have permission to search for alerts, when you resolve holds, you can view the open alerts that are associated with an order and can resolve the alerts. For example, when the address verification fails, alerts are created to remind you that the order is on hold until you verify the address. You can confirm the address, modify the shipping or billing address, and update the order. You can then close the alert and resolve the order hold.

You can view important events that are associated with the order. For example, a customer can place an order for two units of a product initially and cancel one unit later. Such events that result in a change in the order details are saved.

Gifts

Customers might place orders that they want to be delivered as gifts.

If a customer connects with you to order a product as a gift, you can mark the product as a gift, choose to gift wrap the product, and add a gift message. Such customization might incur extra charges and you can confirm with the customer about the charges.

Tracking shipments

After orders are created, customers might contact the call centers to track the shipments. In such situations, you can monitor the delivery of products to the customer, answer their queries, and take appropriate actions.

You can provide the status of an order, and the date when the products are expected to arrive at the customer's location. If the products do not arrive at the customer's location as promised, you can view the shipment tracking details and explain the reasons for the late delivery.

If the customer is required to pick up the products, you can provide the address of the store where the products are available, and the date when the customer can pick up the products from the store.

If the order is already shipped, you can view the shipment details for each order line. Each shipment is uniquely identified by a shipment number and all the order lines that belong to a shipment have the same shipment number.

An order can comprise several order lines and all the order lines can be part of the same shipment or spread across different shipments. Similarly, order lines from different orders can be included in one shipment. For example, consider an order that comprises a notebook with extra components such as a 2 GB RAM, and 1 TB hard disk. In such situations, you can use the shipment or container numbers to explain to the customer whether all products were shipped together or in different containers.

You can inform when the customer would receive the products that are pending delivery. You can also view the relevant tracking information for the shipment or container, on the carriers' website.

Sometimes, holds that are applied to orders delay the fulfillment process. For example, a hold is applied to an order when a payment authorization fails. You must rectify the payment details to resolve the hold until which the shipment is delayed. In such cases, you can explain the reason for the failure of payments and suggest an alternative payment method to the customer.

You must reship an order line if the product is not delivered to the customer. For example, a television that is shipped, does not reach the customer due to mishandling. In such situations, you can reship the product after you track the shipment and confirm the cause of the delay.

If the shipment tracking details show that a product is backordered from a location, it indicates a shortage of inventory. In such situations, you can contact the locations, check the availability at different locations, and inform the customer.

Sometimes, the selling enterprise does not have access to information about the shipments because the products are shipped by an external vendor. In such situations, you can inform the customer that the product is shipped by an external vendor.

You can also track the returned products and the reason for product returns.

Fulfillment

Orders can be fulfilled by either shipping products to the location of the customer or the customer can pick up the products from a store. While placing an order, a customer can decide the manner in which an order must be fulfilled.

Alternatively, the customer can provide fulfillment preferences after order confirmation. The application provides a fulfillment summary interface that allows the user to capture the preferences of the customer that are related to order fulfillment and determine the feasibility.

You can view the order in terms of the order lines that are shipped, picked up by the customer, unavailable order lines, and the order lines that must be removed or modified.

A customer might want a product to be shipped to a location, the customer might choose to pick up the product at a store, or the customer can have the product delivered by the store, if available. Sometimes, the product that is ordered by the customer might be unavailable for shipping, but available at a store. Similarly, the product might not be available at a store but can be shipped from a different location. In such situations, you can change the fulfillment method of the product.

If the customer wants the product to be shipped to a different location, you can change the address. Further, the customer might prefer to receive all products at one time or in multiple shipments as and when they are available. In such situations, you can choose the appropriate optimization type to expedite the fulfillment. You can inform the customer about the level of service options available for the order and choose the level of service that the customer expects for the order.

If the customer wants to pick up the product at a different store or wants to know the stores where the product is available, you can search stores that are based on the address available on the order or the location details that are provided by the customer. Similarly, a customer might prefer to pick up the product on a different date or assign someone else to collect the product. In such situations, you can capture the recipient details or change the pickup date as applicable.

If the customer wants the item to be delivered, you can choose Delivery as the fulfillment method. Alternatively, you can change the fulfillment to a Delivery, if the customer decides to use a delivery service after the order is confirmed.

If the customer chooses to gift a product, you can capture the gift preferences such as gift wrap the product and including a gift message.

A product might be unavailable or the customer might need the product before the expected date of delivery. Therefore, the customer might choose to cancel the product. In such situations, you can either remove or cancel the product.

Change shipping address

When the customer wants you to ship the products to a different location or specifies a change in address due to an incorrect address provided earlier, you can update the order addresses accordingly.

Change fulfillment method

Customers can request to change the fulfillment method for their order. If the order is not shipped yet, you can update the fulfillment method.

Sometimes a customer might prefer to pick up a product at the near by store than waiting for the product to be shipped. Similarly, a customer might want products to be shipped instead of they picking up from a store. In such situations, you can change the fulfillment options for a confirmed order.

When customers request such changes in the order fulfillment method, there can be changes in the charges such as delivery charges. You can inform the customer and then confirm such changes in the order.

Reship

When a customer places an order and the shipment is damaged or not delivered, you can arrange for reship after confirming with the customer.

You can reship all the ordered products or some of the products, based on the reason to reship. You can also reship partial quantity of a product.

Pricing and adjustments

Price refers to the total amount that the customers pay for the orders that they place. The price of a product in an order can vary for several reasons during the order lifecycle.

Price

Price refers to the total amount that the customers pay for the orders that they place.

If the customer wants to know why a certain amount was charged for an order, you can view the associated charges, refunds, and transfer of funds to and from an order. You can also view the invoices that are associated with the transactions and answer queries of your customers.

Based on the various modification tasks that are performed during the lifecycle of an order, the order can be repriced several times. However, when the changes are confirmed, you must know the amount that the customer has already paid and the pending amount. In such situations, you can access all the invoices that are associated with the order and view a breakdown of header charges, taxes, order total, amount collected, and the balance amount.

Charges

Certain products in an order can incur personalization charges, additional taxes, or seasonal discount.

You can view the charges that are applied at the order level, order line level, grand charges, and taxes. You can also add, modify, or delete charges.

Invoices

Invoice is a document that is issued by a seller to the buyer for the purchases that are made by the buyer at an agreed price. An invoice contains a details of all types of charges that are levied on the purchase of a product.

All the charges that are applied during the order lifecycle can be summarized in the invoice. Every invoice is identified by a unique number and contains a statement, which indicates the purpose.

An invoice typically contains an invoice number, date, billing address, store address, and the products that are included in the order. The pricing components include a breakup of header charges, taxes, and the order total. If an amount is pending to fulfill the order, the invoice can indicate the amount that is collected until date and the balance amount. Based on the type of invoice, some of the invoice details change. For example, a return invoice contains the address that is used to return the products and provide a refund, return total, refunded amount, and the remaining refund amount.

An invoice can be created for different transactions such as an order, shipment, return, credit memo, and debit memo. For a return order, a return invoice is generated. Similarly, when you add or modify the charges on an invoiced order, a credit memo is created for the applied discount or a debit memo is created for the applied charges.

The invoicing process initiates the settlement process in the order life cycle. Invoicing can be done either through time-triggered transactions or APIs.

Shipment invoicing occurs after the order is shipped. It initiates the collection process.

Order invoicing enables the settlement process to start at any stage in the lifecycle of an order, not just after the shipment. This can be used in situations when the invoice is spanned across multiple shipments.

Return invoicing enables refunds to be issued to the customer during the return process. The refund can be configured to occur either before or after the receipt of the returned goods.

Invoices can be published immediately after creation (generally for external collections) or after settlement within IBM Sterling Order Management System.

For more information about invoices in IBM Sterling Order Management System, see Invoicing.

Coupons and promotions

Customers might want to avail a price rebate by using the coupons or promotions that are associated with the products in their order. In such situations, you can capture the promotion codes and apply to the order. After applying promotions, you can confirm the final amount that the customer is required to pay to fulfill the order.

Appeasements

Sometimes, customers are unhappy with their shopping experience due to a late shipment, a rude representative, or defective products. A customer might want to return all products and shop at a different store. In such situations, you can create a return order. However, you can save the sales and avoid creating a return by offering an appeasement. You can appease the customer by providing an incentive in the form of a discount on an entire order or individual order lines.

The discount can be a pre-defined percentage or a variable amount. You can also provide a discount on future orders. The appeasements that are applied to the order are recorded in the associated invoice.

Payments

You can capture customer payments, modify a payment, inquire about a payment, and issue invoices for order that are placed by customers.

Payment capture

You can capture customer payments for an order by using the payment confirmation interface. Payment confirmation is the last stage in the order creation process. An order total is computed based on the products and the fulfillment preferences and the customer must pay this amount to fulfill the order.

You can view the order total, adjusted amount, payment methods, and the pending amount. You must understand how the customer prefers to pay the applicable amount and capture the payment details accordingly. For example, the customer might prefer to use the funds that are available in one or more gift cards to pay partially or completely for an order. In such situations, you can add the gift card as a payment option. Similarly, the customer might want to use the funds that are available in an account, pay through multiple accounts, or checks. You can add or remove appropriate payment methods and cater to the needs of the customer.

The application supports various payment methods such as credit cards, customer accounts, pre-paid cards, and store value cards. You can also apply valid coupons and promotion codes to the order.

Payment modification

An order can be modified in several ways that leads to a change in the order total. Orders are modified when you perform tasks such as changing the ordered quantity, price adjustment, or canceling order lines. After you confirm the changes, the application prompts you to capture any balance amount before you can confirm the order.

Consider an order with the order total as $120. If a customer wants to reduce the quantity of the ordered product that costs $50, the order total is decreased by $50 and the adjusted order total is $70. Similarly, when you create a return order, you can view the amount that must be refunded to the customer. In such scenarios, due to credit and debit transactions, charges, taxes, refunds, and other adjustments, the order total is modified. You can view the previous order total, the additional amount that is required or the amount that was reduced, and the adjusted total.

Sometimes, orders are associated with certain charges such as personalization charges. You can add or modify the charges before you capture the payment.

You can see the payment methods that are associated with the order and adjust the amount that is charged against each payment method to cover the order total. Multiple payment methods of the same type can exist on the order. For example, the customer can pay through multiple credit cards.

Customers might prefer to redistribute the charges across multiple payment methods, remove or add a payment method, and so on. In such situations, you can change the payment methods on a confirmed order appropriately.

Payment inquiry

The application also provides a payment inquiry interface, which you can use to answer the queries of your customers. You can view basic information about the order that includes the order number, total, pending charges, and the payment status. You can also view the charges and refunds, credit and debit transactions, and the corresponding invoices.

Returns and exchanges

Customers can return or exchange products for various reasons. Exchanges can initiate a payment or a refund or might not have any impact on the payment. Returns initiate refunds. You can help customers with their exchanges and returns and the payment or refund processes.

You can use different ways to create a return order for the products that the customer wants to return. Sometimes, products reach the customers in a damaged state or a customer might not be satisfied with the product. In such situations, a customer might prefer to return the product and get a refund. The customer might also decide to purchase a similar product in exchange for the original product. As a CSR, you create a return or exchange order, adjust prices, and process payments or refunds for the customer. You can create returns and exchanges for orders that are already shipped.

When you create a return, a refund is created for the returned items and the refund is credited to the selected payment method.

You can help customers exchange the products and process a payment or a refund based on the pricing calculations and the charges or discounts that might be applicable. When you process an exchange, two orders are created. An exchange order is created for the product that the customer bought in exchange for the existing product. A return order is created to return the received product.

You can perform return modification tasks such as adjust pricing, partially or completely cancel a returns and the associated exchange orders, or initiate refunds for returns. You can also perform order modification tasks for exchanges from the **Order summary** page.

Return holds

Returns can be held due to certain discrepancies. For example, holds are applied to returns when address verification fails or when refunds are not authorized. You can apply holds to such return orders, view the history of the holds, and also resolve holds.

When a customer inquires about the delay in processing the refunds, you can verify whether the return order is on hold. You can suggest ways that can help the customer take action. You can then resolve the hold and process the returns.

When a return order is placed on hold, alerts might be created to remind you that a transaction needs manual intervention. If you have permission to search for alerts, when you resolve holds, you can view the open alerts that are associated with a return and can resolve the alerts. For example, when the refund method is invalid, alerts are raised to verify the refund method or add a refund method. Until then, the return is on hold. After the return method is correctly added, you can close the alert and resolve the hold on the return order.

You can view important events that are associated with returns. For example, a customer can initially return an order for two units of a product and can cancel the return of one unit later. Events that result in a change in the return order details are saved.

Alerts

You can use alerts as a to-do list for your tasks and track tasks that must be completed on or before a specific date.

An alert can be associated with an order, return, or a customer.

The system controls the scheduling and fulfillment of an order. However, when invalid information is entered during the order capture and the order cannot be processed further, a human intervention is required. In such situations, alerts are raised.

Typically, alerts are generated by the system. You can also manually create and assign alerts to the user who is responsible to resolve an issue. These alerts are integrated across the entire system. So, the call center administrators or supervisors can create alerts and assign to users in a warehouse or store. Similarly, store users can also create alerts for call center users.

Alerts can be raised for several reasons such as delay in fulfillment, duplicate orders, payment failures, fraudulent data, or cancellation of orders. These alerts are assigned to relevant queues. You can subscribe to a queue to receive the alerts.

You can create, search, view, modify, assign, and resolve alerts.

You can view all assigned alerts and alerts that are pending follow-up. You can also filter alerts based on the type and queue.

You can view the information for each alert based on the alert type. By using the alert details, you can contact the customer and complete the required tasks to close the alert. For example, an alert is raised when the system fails to authorize payments for an order. You can view the customer contact details and the reason for failure in the alert and can contact the customer to obtain the correct information for rectifying the error.

After an alert is resolved, you can close the alert. You can add notes to explain the reason for closing the alerts. This information can be used for auditing purposes.

Managing

Understand the tasks that the customer support representatives and the supervisors can perform in IBM Sterling Call Center to support customers for their orders and the related queries.

Customer inquiry

Home is the default landing page when you log in to IBM Sterling Call Center. The home page provides a convenient access to search for orders, customers, and returns and to manage alerts when customers call for their orders.

Customers can call for various reasons that pertain to their orders. Some of the most common reasons include:

- Where is my order or shipment?
- How do I change the pickup location for my order?
- Can someone else pick up my order for me?
- I want to order a gift for someone. How do I do that?
- Why is the price for my order so high compared to similar options in the market?
- My shipment is damaged. I want to return the items.
- My ordered item is not the correct size. I want to exchange this item.
- I am unhappy with the order because the delivered item is not what I expected.

You can use Sterling Call Center to address customer queries and help customers with their orders. Use the home page to search for the orders and returns and help your customers.

Searching orders, customers, returns, and products

Use the home page and the global search to search for orders, returns, and customer profiles.

Procedure

1. Use the **Search** menu bar on the home page to search for orders, customers, returns, and products.
2. Search for orders by order number, email address, or phone number of the customer.
3. Search for returns by return number, original order number, email address, or phone number of the customer.
4. Search for customers by selecting an enterprise.
   - Search for business customers by organization name.
   - Search for consumer customers by name, email address, or phone number.
5. Search for products by product ID and product name.
6. Use the **Advanced search** option to search for records by applying filters.
   - Use the **Advanced search** option on the home page to search for orders, customers, or returns.
   - Click the icons on the side panel to open the **Advanced search** page for orders, customers, returns, or products.

Searching and adding products to cart

When a customer calls to place an order or know more details about a particular product, you can use the product search option to search for the product and view the details. After you search a product, you can also help customers place an order for that product.

Procedure

1. Select **Products** from the list or click the **Products** icon from the left panel.
2. Select an enterprise.
3. In the **Search** field, enter the product name or ID.

   A list of products is displayed with the **Categories** and **Filters** panels.
4. If the customer wants to place an order for the searched product, click **Add to cart**.

   If the application indicates the searched product as out of stock, help customers find a similar product or find another product based on their requirements.

Order creation

When customers call to place orders for the items that they need, you can help customers create the orders by using IBM Sterling Call Center.

Creating orders

When the customers call to place orders for some items, you can help them create orders based on their requirements. You can also help them complete their draft orders.

Procedure

1. To create an order, on the home page, complete the following steps.

   a. Click **Create order**.

   b. Select a seller enterprise for which you want to create an order.

   To help customers complete the draft order, search for the order.
2. On the **Customer details** tab, select a customer profile, create a new profile, or create an order for a guest user.

   - Select an existing profile.

     a. Select **Consumer** or **Business** for the customer type.

     b. **Note:** The search is case-sensitive.

     To select a consumer customer, enter the customer name, phone number, or email address. To select a business customer, enter the organization name.

     c. If you select a business profile that has multiple contacts, select a contact from the list. You can also modify the shipping, billing, or sold to addresses.

     If multiple currencies are defined for a business customer, select the currency for the order from the list.
   - Create a customer profile.

     Select the option to create a profile for a consumer customer or a business customer.
   - Create an order for a guest user without using a customer profile.

     Enter the customer details and the billing and the shipping addresses for the customer. The entered details are saved only for the order.
3. Click **Next**.

4. On the **Add products** tab, search for the products and then add the products to the cart.

   The items are added to the cart and the pricing summary is displayed.

   Click **View cart** to view the items that are added to the cart. If you want to remove any items from the cart, select the lines, and then click **Remove lines**.
5. Click **Next**.
6. On the **Fulfillment and review** tab, perform the following steps:
   - Select the shipping option according to the customer requirement.
   - Verify the shipping address with the user or use the edit icon to add another address. For more information, see "Changing shipping address" on page 20.
   - Select the level of service for the order. You can also select different levels of service for the order lines based on customer's preference. Based on the selected level of service, charges might vary.

   Note: Multiple shipments are created based on the fulfillment option and the level of service.
7. On the **Fulfillment and review** tab, you can perform the following actions for single or multiple order lines.

   Select single or multiple order lines, click **More actions**, and then perform one of the following tasks for order lines:

Action	Description	Reference
• **Change to pickup** • **Change to shipping**	Change the fulfillment option from ship to pick or pick to ship.	"Changing fulfillment options" on page 19
Change pickup recipient	If the fulfillment method is Pickup, you can update the pick up recipient if the order is to be picked up on behalf of the customer.	"Changing pickup details" on page 20
Adjust pricing	You can apply coupons and promotions, discounts, or charges on the order.	• "Applying coupons and promotions" on page 16 • "Applying discounts and charges for orders" on page 16
Gift options	You can apply gift options to the order lines.	"Applying gift options" on page 18
Manage instructions	You can add instructions for the order based on the customer request.	"Adding order instructions" on page 21
Override price	You can override the price for an item while creating an order.	"Overriding prices" on page 17
Add or view notes	You can add and view notes for the order lines.	

8. Click **Next**.
9. On the **Payment details** tab, select a payment method or add a payment method to make the payment for the order according to the customer's preference.
10. If the funds are sufficient in the selected payment method, click **Confirm order**.

Copying orders

If you want to create a duplicate order, you can copy an existing order. You can also modify the copied order and save the order.

Procedure

1. To copy an existing order, search for the order.
2. Click **Order actions** and then click **Copy order**.
3. To copy an order during the order creation process, click **Copy order** from any page in the wizard.

Results

A new tab is opened to create an order from the copied order.

Order modification

When customers call to modify or cancel their orders, you can help customers update or cancel the orders by using IBM Sterling Call Center.

Adding or updating order lines

After an order is placed, customers might want to add more products to the same order or remove products from the order. They might also want to modify the quantity of the product that is already ordered. You can help your customers modify their products in an order based on the configurations.

About this task

You can add product lines to an existing order, remove lines from an order, or change the quantity of the ordered products when the order status is Created, Released, or Partially released. After the order is canceled, shipped, or returned, you cannot update the order lines.

Procedure

1. Search for the order that you want to update.
2. Click the **Order lines** tab.
3. To update the quantity of an order line, in the **Quantity** column, click the pencil icon and update the quantity.
   - If you increase the quantity, the amount to pay is displayed.
   - If you decrease the quantity, the refund amount is displayed.
   - If the quantity is set to zero, the order line is canceled and the refund amount is displayed.
4. To add lines to the order, click **Add order line**.
5. On the **Add product** page, select the product that you want to add to the order and click **Next**.
   a) On the **Fulfillment and review** page, update the fulfillment details, if any.
   b) On the **Payment details** page, process the payment.

      The new order total is displayed in the **Pricing summary** panel.
6. To remove an order line, click the overflow menu and then click **Cancel line**.

Applying holds for orders

Typically, order holds are applied and resolved by the system. As a customer support representative or a supervisor, you can manually apply order holds.

About this task

If necessary, a customer service representative can place the order on hold.

For example, you adjusted the order price, and your supervisor must review the adjustment before the system can fulfill the order. In this case, you place the order on hold, and your supervisor resolves it.

Procedure

1. Search for the order for which you want to apply a hold.
   - To apply holds for the order, click **Order actions** and then click **Apply holds**.
   - To apply holds for a single order line, click the overflow menu for the return line, and then click **Apply holds**.
   - To apply holds for multiple order lines, select the order lines, and then click **Apply holds**.
2. To apply order holds, select the hold type, enter any comments and click **Apply**.

   The holds icon is displayed next to the order number.

What to do next

You can take appropriate actions and resolve the holds or you can wait for your supervisor to resolve holds for the order or order lines. For more information, see "Resolving holds for orders" on page 15.

Resolving holds for orders

Typically, order holds are applied and resolved by the system. As a customer support representative or a supervisor, you can manually resolve order holds.

About this task

If necessary, a customer service representative can place the order on hold.

For example, you adjusted the order price, and your supervisor must review the adjustment before the system can fulfill the order. In this case, you place the order on hold, and your supervisor resolves it.

Procedure

1. Search for the order for which you want to resolve the hold.
   - To resolve holds for the order, click **Order actions** and then click **Resolve holds**.
   - To resolve holds for a single order line, click the overflow menu for the order line, and then click **Resolve holds**.
   - To resolve holds for multiple order lines, select the order lines, and then click **Resolve holds**.
2. Select the order lines, and click **Resolve**.

   You can also click the holds icon to view and resolve holds.
3. On the **Resolve holds** page, enter any comments and then click **Resolve**.

Results

The lines with resolved holds are displayed in the **Resolved holds** section.

After all the holds are resolved, the holds icon is removed from the order.

Applying coupons and promotions

Customers might call to avail discounts by applying coupons and promotions that they might have missed while placing their orders. You can help customers apply valid coupons for their orders and help them avail the coupon discounts.

About this task

You can apply coupons and promotions while creating an order for a customer or while addressing a customer request.

Procedure

1. If you are creating an order, you can apply coupons after you add products.

   In the **Pricing summary** panel, in the **Coupons** field, enter the coupon code, and click **Apply**. The applied discount for the coupon is displayed under **Promotions** and the price is adjusted in the order total.
2. To apply coupons for an existing order, search for the order.
3. In the **Pricing summary** panel, click **Adjust pricing**.
4. Enter the coupon code and click **Apply**.

   Note: Coupons for only order level are listed. Select one of the order-level coupon or manually enter an order line-level coupon.

   The coupon discount and the new order total are displayed.
5. Click **Save** to apply the coupon on the order.

Results

The applied coupon discount is displayed under **Promotions** in the **Pricing summary** panel and the order total is adjusted. If full payment is done for the order, a banner to process the refund is displayed. If any payments are due, the coupon discount is adjusted with the due payment.

What to do next

You can process the payment or the refund based on the payment status.

Applying discounts and charges for orders

Customers might provide specific instructions such as personalization, or some changes in their order fulfillment. This can incur extra charges. Also, if customers have problems with their order such as price is higher than the other sellers, you might want to offer some discount to the customer to match the price. You can apply such charges and discounts on the order.

About this task

You can apply discounts and charges on the orders while creating them and while addressing customer requests for existing orders.

Procedure

1. If you are creating an order, you can apply discounts and charges after you add products. In the **Pricing summary** panel, click **Adjust pricing**.
2. To apply charges and discounts for an existing order, search for the order for which you want to apply the charge or discount.

   - To apply charges or discounts for the order, click **More actions** and then click **Adjust pricing**, or in the **Pricing summary** panel, click **Adjust pricing**.

- To apply discounts or charges for a single order line, click the overflow menu, and then click **Adjust pricing**.
- To apply discounts or charges for multiple order lines, select the order lines, click **More actions** and then click **Adjust pricing**.

3. In the Adjust pricing page, select the **Adjustment type** as *Charge* or *Discount*.
4. Select the **Name** of the charge or discount that you need to apply.
5. Enter the amount to be charged or the discount to be offered.

   The charge and the discount are adjusted with the order total and a new order total is displayed.
6. Click **Save** to apply the charges or discounts on the order.

Results

In the **Pricing summary** panel, the applied discount is displayed under **Promotions** and the charges are displayed under **Adjustments** and **Shipping**, based on the configuration. The adjusted total is displayed as the order total.

A banner to pay or process the refund is displayed. If any payments are due, the discounts and charges are adjusted with the due payment.

What to do next

You can process the payment or the refund based on the payment status.

Overriding prices

If the customers have concerns with the prices being more competitive on the other shopping websites, you can override the price for the items while creating orders for your customers.

Procedure

1. Click **Create order**.
2. Select a customer, and then add the items to be ordered.
3. On the **Fulfillment and review** tab, select the order line for which you need to override the price.
4. Click **More actions** and then click **Override price**.
5. On the **Override line price** page, enter the new unit price.
6. Select the reason for override.
7. Enter details, if any and click **Save**.

Results

The price per unit and the total amount are adjusted and the new price that is applied to the item is displayed.

Appeasing customers

When customers are unhappy with their orders, you can appease customers by providing discounts on the existing order or for future orders.

About this task

You can appease customers for the entire order or for specific order lines.

Procedure

1. Search for the order.
   - To appease customer for the order or order lines, click **Order actions** and then click **Appease customer**.

- To appease customer for a single order line, click the overflow menu, and then click **Appease customer**.
- To appease customer for multiple order lines, select the order lines, and then click **Appease customer**.

2. On the **Appease customer** page, select the order lines.

   If you are appeasing a customer at the order level, you can select the option to appease the customer for the entire order or for specific order lines, based on the problem that is shared by the customer.
3. Select the **Reason** for appeasement.
4. Select the **Appeasement option** as a discount for the same or a future order.
5. Click **Save**.

Results

All applied appeasements are displayed on the **Appease customer** page as previous appeasements.

- If the appeasement is applied for the existing order, a credit memo is generated and a banner to process the refund is displayed. In the **Pricing summary** panel, click **View all invoices** to view the credit memo.
- If the appeasement is applied for a future order, a success message is displayed and the applied appeasement is handled based on your business implementation.

Applying gift options

Customers can contact a customer support representative to apply gift options for their orders. As a customer support representative or a supervisor, you can apply gift options while creating an order for a customer or while addressing a customer request. You can apply gift option only if the order is not shipped.

About this task

When you create an order, you can apply gift options for the order lines. After an order is created, you can apply gift options for the entire order or for specific order lines.

Procedure

1. If you are creating an order, you can apply gift options after you add products. On the **Fulfillment and review** tab, select order lines, click **More actions** and then click **Gift options**.
2. To add gift options to an existing order, search for the order for which you want to apply the gift option.
   - To apply gift options for the order or order lines, click **Order actions** and then click **Gift options**.
   - To apply gift options for a single order line, click the overflow menu, and then click **Gift options**.
   - To apply gift options for multiple order lines, select the order lines, click **More actions**and then click **Gift options**.
3. On the **Gift options** page, select the order lines for which you want to apply the gift option.

   If you are applying gift options at the order level, you can select the option to apply gift option on the entire order or on the order lines.
4. Select the **Make this a gift** checkbox.
5. If the gift wrapping option is available for the selected order lines, the option is enabled and you can select the **Add gift wrapping** checkbox. This might incur extra charges and are displayed in the **Pricing summary** panel.
6. Add a message that the customer wants to convey to the recipient of the gift.

   If the customer wants to add different messages for each order line, set **Add different messages to order lines** to on. You can then mark the gift option, the gift wrapping option, and enter different messages for each order line.

Changing fulfillment options

By default, the ordered items are shipped to customers unless opted by the customers for a pick up while placing an order. Customers might sometimes later call to change the fulfillment option for their orders such as from ship to pick or from pick to ship. You can help customers change the fulfillment option if the order is not already shipped.

About this task

You can change the fulfillment option for the order lines if the order is not yet shipped.

Procedure

1. If you are creating an order, you can change the fulfillment option after you add products. On the **Fulfillment and review** tab, select order lines, click **More actions** and then click **Change to pickup** or **Change to ship**.
2. To change fulfillment option for an existing order, search for the order.
   - To change fulfillment option for the fulfillment group, in the **Fulfillment Shipments**, or **Pickup** tab, expand a fulfillment group, and then click **Change fulfillment options**.
   - To change fulfillment option for a single order line, in the **Order lines** tab, click the overflow menu for an order line, and then click **Change fulfillment options**.
   - To change fulfillment option for multiple order lines, in the **Order lines** tab, select the order lines, click **More actions** and then click **Change fulfillment options**.

     Note:

     – You can change the fulfillment option for multiple order lines only under the same fulfillment group. If you select order lines from different fulfillment groups, the **Change fulfillment options** action is disabled.

     – You can use the pencil icon in the Fulfillment, Shipment, or Pickup tab to update the fulfillment details for each fulfillment group.
3. On the **Change fulfillment options** page, all order lines are selected by default. You can manage the selection based on your requirement.
4. Select the fulfillment method as **Shipping** or **Pickup**.
5. When you change the shipping option from **Shipping** to **Pickup**, complete the following steps:
   a. Select a store from which the customer can pick up the order.
   b. If the customer wants someone else to pick up the order on their behalf, change the pickup recipient. On the **Change pickup recipient** page, enter the details of the person who is authorized to pick up the order.
   c. Click **Pickup appointment** and select the date on which the customer intends to pick up the order.

      Important: The dates in the Sterling Call Center application are based on the locale that is set in your browser.
   d. Enter comments, if any.

   If the fulfillment option is changed for all order lines, the fulfillment is called Pickup. If some order lines are marked for pickup, based on the pickup details, the order is split across multiple fulfillment groups.
6. When you change the shipping option from **Pickup** to **Shipping**, complete the following steps:
   a. Verify the shipping address with the customer or add a new shipping address based on the customer's request.
   b. Select a level of service for the selected order lines. Extra charges might be levied on the order based on the selected level of service.
   c. Enter comments, if any.

If the fulfillment option is changed for all order lines, the fulfillment is called Shipment. If some order lines are marked for shipment, based on the shipment details, the order is split across multiple fulfillment groups.

Changing pickup details

Customers might have opted for pick up of the ordered items. Sometimes, they might call to update the pickup details such as changing the pickup recipient or the pickup date.

About this task

Procedure

Under the **Fulfillment** or **Pickup** tab, expand the fulfillment group that is for pickup.

- Use the pencil icon to change the following details for the Pickup fulfillment group.
  - Pickup store
  - Instructions
  - Fulfill by
  - Pickup appointment
  - Pickup recipient
- Click **Change fulfillment options** and update the following details for the selected order lines in the Pickup fulfillment group.
  - Store address
  - Pickup recipient
  - Pickup appointment
- Use the **Change pickup recipient** option under the Pickup fulfillment group and enter the details in the **Change pickup recipient** page.

Important: The dates in the Sterling Call Center application are based on the locale that is set in your browser.

Changing shipping address

Customers might call to update the shipping address for their orders. You can help customers update the shipping address for their orders.

Procedure

1. Under the **Fulfillment** or **Shipment** tab, expand the fulfillment group that is for shipping.
   - Use the pencil icon for the shipping address and change the shipping address for the fulfillment group.
   - Alternatively, click **Change shipping address** for the fulfillment group, select or add a different address, and click **Save**. Then, manage the selection of the order lines, verify the changed address under the shipping details, and click **Save**.
   - Click the **Change fulfillment options** for the Shipment fulfillment group, update the shipping address for the selected order lines, and click **Save**.
2. On the **Change shipping address** page, select an existing address or add a new address.
3. If you want to save the address in the customer profile, select the **Save to customer profile** checkbox. It is then available for future use to the customer while creating and managing orders.
4. If you select the **Save to customer profile** checkbox, options to set the address as a default billing address, and the default shipping address are displayed. Use these options to set the default addresses.

5. Click **Save**.

Results

Fulfillment groups are created based on the fulfillment options for the order lines.

Adding order instructions

Customers might call for their orders and provide specific instructions for the ordered items. You can add these instructions in the order for quick reference and actions.

Procedure

1. If you are creating an order, you can add instructions after you add products. In the **Fulfillment and review** tab, select order lines, click **More actions** and then click **Manage instructions**.
2. To add instructions for an existing order, search for the order.
   - To add instructions for the order or order lines, click **More actions** and then click**Manage instructions**.
   - To add instructions for a single order line, click the overflow menu, and then click **Manage instructions**.
   - To add instructions for multiple order lines, select the order lines, click **More actions** and then click **Manage instructions**.
3. Under the **Fulfillment**, **Shipment**, or **Pickup** tab, expand the fulfillment group.
4. Click the pencil icon for **Instructions**, and on the **Manage instructions** page, select the instruction type, add the instructions, and click **Save**.

   You can click **Add instructions** to add multiple instructions for the order.
5. Alternatively, click **Manage instructions** for the fulfillment group, and add the instructions.

Changing shipping option

Orders are delivered based on the selected shipping option. Customers might call to expedite the shipment, which might incur extra shipping charges. You can help customers change the shipping option for their order.

About this task

The overall shipping method that is used for order fulfillment is displayed in the **Fulfillment**, **Shipment**, or **Pickup** tab. You can change the shipping option based on the customer requirement.

Procedure

1. Search for the order.
2. On the **Fulfillment**, **Shipment**, or **Pickup** tab, click **Change shipping option** for the fulfillment group.
3. Select the shipping option based on customer request and click **Save**.

Managing payment methods

Customers can use different payment methods to pay for their orders. You can help customers add payment methods for the orders and pay for their orders. An order is confirmed only after the payment is complete.

Procedure

1. On the **Payment details** tab, click **Add payment method**.

- If payment methods are associated to the customer profile, you can select a payment method from that list based on the customer's preference. If the customer wants to use a different payment method, you can add a payment method and use that payment method for the order.
- If no payment method is added to the customer's profile, you can add a payment method.

2. To add a payment method, on the **Add payment method** page, select the payment type.
3. Enter the details for the selected payment type.
4. If you want to save the payment method to the order and to the customer's profile, confirm with the customer and click **Save to customer profile**.

   If the payment method is saved to the customer profile, it can be used for future orders. If this option is not selected, the payment method is added only for the order.

   After you add a payment method, the payable amount is displayed in the **Amount to pay** field.
5. If the customer wants to split the payment across payment methods, edit the amount to pay for the selected payment method. The option to add another payment method is displayed.
6. Add another payment method. The balance amount is automatically added.
7. If you want to remove a payment method, click the overflow menu and click **Remove payment**.

Results

After an order is created, you can view payment activities, modify the payment method, suspend or resume payment, review payment activity, and view invoices.

You can view the payment summary of the order, which displays the payment status and the pending charges or any refund amount. If some of the ordered items are returned or exchanged, the details are displayed on the **Payment methods** tab. If the order has an associated return or exchange order, then the details of amount pending to be credited and the amount credited are displayed.

Reshipping orders

When customers contact for the issues with their orders such as ordered items are damaged or cargo is lost, you can reship the order to the customer.

Procedure

1. To reship an existing order, search for the order.
   - To reship the order or order lines, in the **Fulfillment** or **Shipment** tab, expand the fulfillment group that needs to be reshipped, and then click **Reship**.
   - To reship a single order line, in the **Order lines** tab, click the overflow menu, and then click **Reship**.
   - To reship multiple order lines, select the order lines, click **More actions** and then click **Reship**.
2. On the **Reship** page, select the order lines and enter the quantity to be reshipped.
3. Select the reason for reship, and enter the comments, if any.
4. Click **Save**.

Canceling orders or order lines

You can cancel orders or order lines for your customers based on their requirements. An order cannot be canceled if it is already shipped.

About this task

You can cancel the entire order or specific order lines.

Procedure

1. Search for the order that you want to cancel.

2. You can cancel the entire order or specific order lines.
   - To cancel the entire order, click **Order actions** and then click **Cancel order**.
   - To cancel a single order line, click the overflow menu, and then click **Cancel line**.
   - To cancel multiple order lines, select the order lines, and then click **Cancel lines**.
3. On the **Cancel order** page, select the order lines that you want to cancel.

   If you are canceling the order, you can select the option to cancel the entire order or the order lines.
4. Select a reason for canceling the order or order lines and add comments, if any.

   If you want to cancel order lines for different reasons, set **Cancel lines for different reasons** to on. You can then select a different cancellation reason and add comments for each order line that you want to cancel.
5. Click **Next**, and then click **OK** to confirm the order cancellation.

Order management

You can use IBM Sterling Call Center to review payment activities, view order invoices, or manage order notes for the orders that are placed by customers.

Reviewing payment activities

You can view the payment activities for the orders that are placed by customers. The payment activity contains the payment for the ordered items and any other charges that are levied on the order.

Procedure

1. Search for the order.
2. Click the **Payment methods** tab.
3. Click **Review payment activity**.
4. On the **Payment activity** page, you can view all payments that are made by the customer for the order.

   The summary displays the total of the authorized amount, the charged amount, and the refunded amount.

Viewing ship nodes

A ship node gets assigned for shipments and order lines. When an order is released, the actual ship node that fulfills the shipment gets assigned. You can now view the assigned ship nodes for shipments and order lines.

Procedure

1. Search for the order for which you want to view ship nodes.
2. To view the ship node for the order, click the **Shipments** tab.

   A ship node is assigned for the shipment. Click the ship node link to view the address and phone number of the ship node.
3. Click the **Order lines** tab, and then click the overflow menu of an order line and click **View ship nodes**.

   The **Ship nodes** page is displayed that includes the order line status with the quantity break up and details of the ship nodes that are assigned for the order lines that are fulfilled by each ship node.

Viewing order invoices

You can view invoices for the orders that are fulfilled.

About this task

Invoices are generated when orders are fulfilled. If an order is fulfilled as a single fulfillment group, a single invoice is generated for all items. If an order is fulfilled at different times based on different fulfillment groups, multiple invoices are generated at each stage.

Invoices are also generated for any credit memo that is generated for customer appeasements or for other reasons.

Procedure

1. Search for the order.
2. In the **Pricing summary** panel, click **View all invoices**.
3. To view the details of the invoice, click the **Invoice number**.

   In the **Summary** panel, all the details of the invoice are displayed.

Viewing order price adjustments

You can view price adjustments that are applied to an order.

About this task

Any charge or discount that is applied to the order or order lines is displayed as a summary for the order.

Note: If you do not have permission to apply price adjustments, you can still view the applied adjustments on the order.

Procedure

1. On the home page, search for the order.
2. If you have the permission to apply price adjustments, in the **Pricing summary** panel, click **Apply adjustments** to view the applied price adjustments, if any.
3. If you do not have the permission to apply price adjustments, in the **Pricing summary** panel, if any price adjustments are applied for the order or the order lines, click **View price adjustments**.

   A list of the applied prices adjustments is displayed.

Managing alerts for orders

You can view, create, and manage alerts for specific orders from the order details page.

Procedure

1. Search for the order.
2. Open the **Alerts** tab.

   A list of alerts that are associated to the order are displayed.
3. Click an alert to view the alert details.
4. You can perform various actions for the alerts.
5. If you want to create a new alert for the order, on the order details page, click **Order actions** and then click **Create alert**.

Managing order and order line notes

Notes are added to the orders or order lines by the system for various events in the order fulfillment process. You can also add notes manually. You can add and view the order notes in the **Notes** side panel and can add and view the order line notes for each order line under the **Order lines** tab.

Procedure

1. Search for the order.
2. In the **Notes** panel, add or view order notes. For order line notes, click the **Order lines** tab and then click **Add or view notes** for the order lines.
3. You can filter the notes by using the following filter criteria:
   - System
   - User
   - High priority

   You can also filter the notes by note type such as customer appeasement, holds, or changed payment method.
4. You can enter the keywords to search in the available notes.
5. To add order notes manually, click **Add note** in the **Notes** panel.

   If you want to add line-level notes, click the **Order lines** tab on the **Order summary** page, click the overflow menu or select the order line, and then click **Add or view notes**.

   You can also add line-level notes while creating an order.
6. You can select the note type, contact type, and contact reference.
7. Enter the description for the note.
8. You can select the label as **High priority** or **Internal**. The applied label is then used to filter notes.
9. Click **Save**.
10. If you want to update any note, open the note and click the pencil icon.
11. If you want to delete any note, open the note and click the delete icon.

Returns and exchanges

Customers might not be satisfied with their orders and might want to return ordered items for reasons, such as a damaged product, size issue, or wrong item. As a customer support representative or a supervisor, you can help customers with their returns or exchanges. Customers can either return or exchange the items based on the return policy.

Creating returns

Customers might call you to return ordered items for various reasons. To create returns for their orders, you can use the IBM Sterling Call Center application.

Procedure

1. Search for the order.
2. Check the order status. If the items are shipped, you can create the returns.
3. Click **Order actions** and click **Create return or exchange**.
4. Select the **Return** option and the return reason. You can also apply different return reasons for the items.

   A draft return order is created.
5. Select the items to be returned, enter the return quantity for each order line, or click **Set full return quantity**.

If an order line has a return policy violation, the order line is disabled for returns, and an icon is displayed to indicate the violation.

If you have the permission to override the return policy violation, the **Override** option is displayed for the order line.

To override a return policy violation, you must be added to the approval group.

a. Click **Override** to override the return policy violation.
b. On the **Return policy override** page, enter the description and then click **Apply**.
c. After the return policy violation is overridden, enter the quantity to return for the order line.

Note: After you override a return policy violation, add the quantity to return, and save the draft return order. When you open the draft return order, the **Override** option is displayed for the order line. You can proceed with the return order for the saved quantity. If you want to update the quantity for return, you must override the return policy violation again.

6. Optional: If you want to save the draft return, click **Actions** and then click **Save changes**.

   If you want to save changes to the draft return order and close the **Create return** wizard, click **Actions** and then click **Save and exit**.
7. Click **Next**.
8. On the **Return method** tab, click the pencil icon if you want to change the return from or the refund to address.
9. If you want the customer to keep the item, update the order line. By default, the item to be returned is marked for shipment.
10. Select or add the payment method where the customer wants the refund amount to be credited.

    The summary of the return is displayed in the **Pricing summary** panel.
11. To process the return order, click **Confirm**.

Results

The refund is credited to the selected payment method based on the return policy.

Creating returns and exchanges

Customers might call you to exchange or return the ordered items for various reasons, such as size, color, or the incorrect item was shipped. To create returns and exchanges for their orders, you can use the IBM Sterling Call Center application.

Procedure

1. Search for an order.
2. Check the order status. If the items are shipped, you can create an exchange order.
3. Click **Order actions** and then click **Create return or exchange**.
4. Select the **Return and exchange** option and the return reason. You can also apply different return reasons for the items.

   A draft return order is created.
5. Select the items to be returned.

   If an order line has a return policy violation, the order line is disabled for returns, and an icon is displayed to indicate the violation.

   If you have the permission to override the return policy violation, the **Override** option is displayed for the order line.

   To override a return policy violation, you must be added to the approval group.

   a. Click **Override** to override the return policy violation.
   b. On the **Return policy override** page, enter the description and then click **Apply**.

c. After the return policy violation is overridden, enter the quantity to return for the order line.

Note: After you override a return policy violation, add the quantity to return, and save the draft return order. When you open the draft return order, the **Override** option is displayed for the order line. You can proceed with the return order for the saved quantity. If you want to update the quantity for return, you must override the return policy violation again.

6. Enable **Exchange** if the customer wants to exchange any item. If the customer wants to exchange some items and return the other items, enable **Exchange** only for the items to be exchanged.
7. Enter the return quantity for the order lines, or click **Set full return quantity**.
8. Optional: If you want to save the draft return, click **Actions** and then click **Save changes**.

   If you want to save changes to the draft return order and close the **Create return** wizard, click **Actions** and then click **Save and exit**.
9. Click **Next**.

   A draft exchange order is created.
10. On the **Exchange products** page, review the items to exchange.
    a) Search for the products that you want to select as an exchange and then click **Add as exchange** or **Select variation**.
    b) Click **Browse catalog** to search for products as exchange and then click **Add as exchange** or **Select variation**.
11. Click **Next**.
12. On the **Return order lines** tab, review the items to return. By default, the item to be returned is marked for shipment.
13. If you want the customer to keep the item, click the overflow menu for an order line, and then delete the line. You can also adjust pricing and add and view notes.
14. On the **Exchange order lines** tab, view and update the following details.
    - Shipping option
    - Exchange type
    - Shipping details
15. Click **Next**.
16. On the **Payment details** page, review the details of the amount that is transferred from the original order to the exchange order.
17. To process the return and exchange order, click **Confirm**.

    The return order and exchange order are created.

    The summary of the return is displayed in the **Pricing summary** panel.

Results

You can view the return and exchange details on the **Return summary** page.

What to do next

You can search for the exchange order and fulfill the order.

Creating returns without receipts

When customers do not have the receipt and if the organization accepts such returns based on their return policy, customers can return such products without the receipts. You can help customers create returns without receipts by using IBM Sterling Call Center.

About this task

You can create return without receipts on the home page or from the customer profile page.

Procedure

1. On the home page, click **Create return without receipt**.
2. Select an enterprise and click **OK**.
3. In the **Create return** wizard, select a customer, create a customer, or proceed without the customer profile, and click **Next**.

   If you want to create a return without receipt for a customer, open a customer profile, and then click **Create return without receipt** option from the **Actions** menu.
4. Search or browse the product catalog and then add products for return.
5. Click **Next**.
6. On the **Products to return** page, select the option to return or return and exchange the products.

What to do next

Based on the selected option, you can further process the return or return and exchange of the products.

Return management

You can use IBM Sterling Call Center to review payment activities, view return invoices, or manage return notes for the returns that are created for customer orders.

Applying holds for returns

Typically, holds are applied and resolved by the system. As a customer support representative or a supervisor, you can manually apply holds for return orders.

About this task

If necessary, a customer service representative can place the return order on hold. For example, you place a return order on hold for a fraud check, and after verification, you can resolve the hold.

Procedure

1. Search for the return order to which you want to apply a hold.
   - To apply holds for a return order, click **Actions** and then click **Apply holds**.
   - To apply holds for a single return line, click the overflow menu for the return line, and then click **Apply holds**.
   - To apply holds for multiple return lines, select the return lines, and then click **Apply holds**.
2. To apply return order holds, select the hold type, enter any comments and then click **Apply**.

   The holds icon is displayed next to the return order number and for return lines on which the hold is applied.

What to do next

You can take appropriate actions and resolve the holds or you can wait for your supervisor to resolve holds for the return order or return lines. For more information, see "Resolving holds for returns" on page 29.

Resolving holds for returns

Typically, holds are applied and resolved by the system. As a customer support representative or a supervisor, you can manually apply and resolve holds for return orders.

About this task

If necessary, a customer service representative can place the return order on hold. For example, you place a return order on hold for a fraud check, and after verification, you can resolve the hold.

Procedure

1. Search for the return order to which you want to resolve the holds.
   - To resolve holds for a return order, click **Actions** and then click **Resolve holds**.
   - To resolve holds for a single return line, click the overflow menu for the return line, and then click **Resolve holds**.
   - To resolve holds for multiple return lines, select the return lines, and then click **Resolve holds**.
   - You can also click the holds icon to view and resolve holds.
2. On the **Resolve holds** page, enter any comments and then click **Resolve**.

Results

The lines with resolved holds are displayed in the **Resolved holds** section.

After all the holds are resolved, the holds icon is removed from the return order.

Applying discounts and charges for returns

When customers want to return products, charges or discounts might need to be applied. For example, if a customer is returning a damaged product, the shipping charges must be reverted. Also, if the customer wants to return a gift, the wrapping charges are levied on the customer when the refund is calculated. You can apply charges and discounts on the returns as price adjustments.

About this task

You can apply discounts and charges on the entire return order or on specific order lines that are returned.

Procedure

1. If you are creating a return, apply discounts and charges after you select the product for returns. In the **Pricing summary** panel, click **Adjust pricing**.
2. To apply charges and discounts for return lines, click the overflow menu and then click **Adjust pricing**.

   You can also click the line total and apply price adjustments.
3. On the **Adjust pricing** page, from the **Adjustment type** list, select **Charge** or **Discount**.
4. Select the name of the charge or discount that you need to apply.
5. Enter the amount of the charge or the discount.

Results

In the **Pricing summary** panel, the adjusted total is displayed as the return total.

What to do next

You can process the payment or the refund based on the payment status.

Viewing return methods

Return methods define how the items are returned by customers for the return orders. You can view the return methods for the returned items on the return summary page.

About this task

Customers can return the products by shipping the products or by dropping them off at designated locations. Sometimes, when a customer wants to return items, the return is created, but the customer is asked to keep the items, and the refund is processed.

Procedure

1. On the home page, search for the return by using the return order number or the contact information of the customer.
2. Click the **Return methods** tab to view the method that is used for returning the ordered items.

Results

You can view the return groups based on the return method for each group. The return group displays the return tracking details, the return from, return to, and the refund to addresses. You can also view the order lines in the return shipment.

Viewing refund activities

You can view the refund activities for returns that are processed for customer orders. The refund activity contains the refund for the returned items. The refund amount might be adjusted by charges such as shipping charges or personalization charges.

Procedure

1. On the home page, search for the return by using the return order number or the contact information of the customer.
2. Open the **Refund methods** tab.
   a) To view the refund details of the return order, click **Review payment activity**.

      View all refunds that are made to the customer. The summary displays the total of the authorized amount, the refunded amount, or the amount that is refunded to another payment method.

   b) In the **Payment summary** section, view the payment status. Click **View all payment activities** to view all the payment activities for the return order.

   If the return order has an associated exchange order or a return fulfillment order, then the details of amount pending to be credited and the amount credited are displayed.

Viewing return invoices

You can view invoices for the returns that are completed and the refunds are processed.

About this task

Invoices are generated when returns are completed. The refunds are processed based on the return policy of your organization. If the items are returned by customers through shipments, the refunds might be credited after the items are received. Based on different scenarios, return invoices are generated at different point in time in the return lifecycle of the order. Return methods determine the generation of invoice for the returned items.

Invoices are also generated for any credit memo that is generated for customer appeasements or for other reasons.

Procedure

1. On the home page, search for the return by using the return order number or the contact information of the customer.
2. In the **Pricing summary** panel, click **View all invoices**.

   A list of return invoices are displayed with the `Return invoice` type.
3. To view details of the invoice, click the **Invoice number**.

   In the **Summary** panel, all details of the invoice are displayed.

Viewing return price adjustments

You can view price adjustments that are applied to the return order.

About this task

Any charge or discount that is applied for the return order or return lines is displayed as a summary for the return order.

Procedure

1. On the home page, search for the return by using the return order number or the contact information of the customer.
2. If any price adjustments are applied for the return order, in the **Pricing summary** panel, click **View price adjustments**.
3. To view the price adjustments for the return lines, click the line total and then click **View price adjustments**.

Results

A list of the applied prices adjustments is displayed.

Managing alerts for returns

You can create, view, and manage alerts for specific returns from the return details page.

Procedure

1. Search for the return order.
2. Open the **Alerts** tab.

   A list of alerts that are associated to the return order are displayed.
3. Click an alert to view the alert details.
4. You can perform various actions for the alerts.
5. If you want to create a new alert for the return, on the return details page, click **Actions** and then click **Create alert**.

Managing return and return line notes

Notes are added to the returns or return lines by the system for various events in the return and refund process. You can also add notes manually. You can add and view the return notes in the **Notes** side panel and can add and view the return line notes for each return line under the **Return lines** tab.

Procedure

1. On the home page, search for the return by using the return order number, or the contact information of the customer.
2. In the **Notes** panel, view all notes for the return order.
3. You can filter the notes by using the following filter criteria:

- System
- User
- High priority

You can also filter the notes by note type such as change return address, change return method, or wrong item received.

4. You can enter the keywords to search in the available notes.
5. To add return notes manually, click **Add note** in the **Notes** panel.

   If you want to add line-level notes, click the **Return lines** tab on the **Return summary** page, click the overflow menu or select the order line, and then click **Add or view notes**.

   You can also add line-level notes while creating a return.
6. You can select the note type, contact type, and contact reference.
7. Enter the description for the note.
8. You can select the label as **High priority** or **Internal**. The applied label is then used to filter notes.
9. Click **Save**.
10. If you want to update any note, open the note and click the pencil icon.
11. If you want to delete any note, open the note and click the delete icon.

Processing refunds

You can process refunds for return orders by using the IBM Sterling Call Center application. When you use the **Refund** option, the return order is invoiced and the refund is processed.

Procedure

1. On the home page, search for the return by using the return order number, original order number, or contact information of the customer.
2. From the **Actions** menu, click **Refund**.

   On the **Refund** page, all return lines that can be invoiced are displayed.
3. Optional: Add a note for initiating refunds for the return order.
4. Click **Refund**.

   An invoice is generated, and the refund is processed.
5. To view the return invoice, click **View invoice**.

Canceling returns or return lines

You can cancel returns or return lines for your customers based on their requirements. An order cannot be canceled if the customer returned the products. If the return order has an associated exchange order, when you cancel the return order, you can retain or cancel the associated exchange order.

About this task

You can cancel the entire return and any associated exchange order. You can also cancel specific return lines and exchange lines. If a return has an associated exchange order, you can select the option to cancel only the return, or you can cancel both the return and the exchange.

Procedure

1. Search for the return that you want to cancel.
2. To cancel the return order, click **Actions** and then click **Cancel return**.
3. Select the option to cancel the entire return order or return lines.

   If you select the **Return lines** option, the list of all return lines is displayed.

4. Select the return lines that you want to cancel and enter the quantity that you want to cancel for each return line.
5. Select a reason for canceling the return or return lines and add comments, if any.

   If you want to cancel multiple return lines for different reasons, set **Cancel lines for different reasons** to on. Then, you can select a different cancellation reason and add comments for each return line that you want to cancel.
6. Click **Next**.

   If the return has an associated exchange order, the **Cancel exchange order** page is displayed.
7. Select the option to cancel the entire exchange order or order lines, or to retain the exchange order.

Option	Description
Entire order	Select this option to cancel the entire exchange order.
Order lines	Select the order lines that you want to cancel and enter the quantity that you want to cancel for each order line.
Retain associated exchange order	Select this option to cancel only the return order or order lines and retain the associated exchange order.

8. Select a reason for canceling the exchange order or order lines and add comments, if any.

   If you want to cancel multiple order lines for different reasons, set **Cancel lines for different reasons** to on. You can then select a different cancellation reason and add comments for each order line that you want to cancel.
9. Click **Next** and to confirm the cancellation process, click **OK**.

   On the **Return modification checkout** page, the updated amount to refund or amount to pay is displayed.
10. Click **Add payment method** to add a payment for processing the payment or refund of the canceled return and exchange orders.

Results

The status of the return order is updated after the cancellation of the return or return lines. The status of the canceled associated exchange order or order lines is also updated. The return and exchange totals are updated in the **Pricing summary** panel.

Exchange management

An exchange order is similar to a new order. It might involve payments or adjustments with the return order.

You can perform all the actions on an exchange order and order lines that you can on a new order.

Customer management

You can use IBM Sterling Call Center to create customer profiles, manage customer records, manage the billing and shipping addresses, and also manage the payment methods of the customers.

Creating consumer customer profiles

Consumer customers might create their profiles in the sales site while placing orders. You can also create customer profiles by using IBM Sterling Call Center.

About this task

You can create a customer profile from the home page or while creating an order.

Procedure

1. On the home page, click **Create customer profile**.
2. On the **Customer details** page, select an **Enterprise**.
3. Enter the given name and surname of the customer.
4. Enter the email address and phone number of the customer.
5. Select the status for the customer.
6. You can enter the customer demographics such as membership level, relationship type, and vertical.
7. You can enter the shipping address of the customer.
8. You can add the payment details of the customer.
   a. Select a payment type.
   b. Enter the billing address of the customer.
9. Click **Create profile**.

   Note: You can also create a customer profile while creating an order.

Results

A customer profile is created and can be used to create and track orders in Sterling Call Center.

Creating business customer profiles

Business customers are small businesses, commercial organizations, or institutions. The business customers might create their profiles in the sales site when they place orders. You can also create customer profiles by using IBM Sterling Call Center.

About this task

You can create a business customer profile from the home page or while creating an order.

Procedure

1. On the home page, click **Create customer profile**.
2. On the **Create customer profile** page, select the **Business** customer type.
3. In the **Organization details** section, select an **Enterprise**.
4. Optional: Enter the customer ID for the organization.
5. Enter the organization name.
6. Optional: Enter the website of the organization.
7. Optional: Enter the parent customer name manually or use the Advanced search option to select the parent customer.
8. Select the status of the customer. The default status is Active. You can create and manage orders for customers with the Active status.
9. Enter the contact details of the contact person from the organization.
   a) Enter the given name, surname, and email address of the contact person.
   b) Optional: Enter the phone number, mobile number, and fax number of the contact person.
   c) Optional: Enter the job title and the department of the contact person.
   d) Select the status of the contact person.
10. Optional: Enter the organization demographics such as membership level, relationship type, and vertical. Select supported currencies and set the default currency.
    a) Select the shipping preference for the organization.
    b) If the organization is not required to pay tax, select the **Exempt from tax** checkbox.
    c) Enter the tax exemption certification details.

11. Optional: Enter the shipping address for the organization.
12. Add the payment details of the organization.
    a) Select a payment type.
    b) Enter the billing address of the organization.
13. Click **Create profile**.

Results

After the customer profile is created, you can use the profile to create and track orders in Sterling Call Center.

Updating customer profiles

You can update the details of the customer and also update the customer status.

Procedure

1. Search for the customer.
2. Click the pencil icon.
3. Update customer details such as email address, shipping address, or billing address.
4. For business customers, add the **Sold to address** if it is different from the billing and shipping address.
5. Update the customer status to Active, On hold, or Inactive.
6. View or delete payment methods from the customer profile.
7. Click **Save** to save the changes that are made to the customer profile.

Adding contacts for business customers

Business customers are organizations that interact with other organizations through multiple contacts. You can add contacts for business customers in IBM Sterling Call Center.

Procedure

1. Search for the customer.
2. On the customer profile page, click the **Contacts** tab.
3. Click **Add contact**.
4. Enter the given name, surname, and email address of the contact person.
5. Optional: Enter the phone number, mobile number, and fax number of the contact person.
6. Optional: Enter the job title and the department of the contact person.
7. Select the status of the contact person.
8. Optional: Enter the shipping address for the contact person.
9. Click **Save**.

   Your contact profile is saved. You can edit it by clicking the contact name. You can add an address, set the default address to use for orders, and update an address.

Results

If a business customer has multiple contacts, business contacts are available for selection when you create an order. If only one contact is associated with the business customer, it is used when you create an order.

Managing addresses

When customer profiles are created, the shipping and billing addresses might not be configured. However, shipping and billing addresses are required for fulfilling customer orders. You can add or update the addresses for orders until they are shipped.

About this task

When you create and update a customer profile, you can add and update shipping and billing addresses. You can update the shipping address for the order and also save it to the customer profile.

Procedure

1. To add shipping and billing addresses when you create a customer profile, see "Creating consumer customer profiles" on page 33.
2. To add or update shipping and billing addresses in the customer profile, see "Updating customer profiles" on page 35.
3. To add or update the shipping address for an order, see "Changing shipping address" on page 20.
4. Set the default shipping and billing address in the customer profile or on the **Fulfillment** or **Shipping** tab on the order summary page.

Managing payment methods in customer profile

The **Payment methods** tab in the **customer details** page contains the payment methods of the customers that are added to their profile. If a payment method is used for an order but not added to the customer profile, it is not displayed in the **Payment methods** tab of the **customer details** page.

Procedure

1. Search for the customer.
2. In the **Payment methods** tab, view the payment methods that are added to the customer profile.
3. If a customer wants to add a payment method for future orders, you can add the payment method to the customer profile.
4. If the customer wants to stop using an existing payment method for future orders, you can help customer delete that payment method from their profile. Select a payment method and click the delete icon.

   However, if the payment method is used for any open order, it will not be deleted from the order.

Managing alerts for customers

You can create, view, and manage alerts for specific returns from the customer details page.

Procedure

1. Search for the customer.
2. Open the **Alerts** tab.
   A list of alerts that are associated to the customer are displayed.
3. Click an alert to view the alert details.
4. You can perform various actions for the alerts.
5. If you want to create a new alert for the customer, on the customer details page, click **Actions** and then click **Create alert**.

Managing customer notes

Notes are added to the customer profile by the system for various events. You can also add notes manually. You can view all the notes in the Notes side panel.

Procedure

1. Search for the customer.
2. In the **Notes** panel, view all notes.
3. You can filter the notes by using the following filter criteria:
   - System
   - User
   - High priority
4. You can also filter the notes by note type such as called customer, hold information, or price adjustment.
5. You can also search by keywords in the available notes.
6. To add notes manually, click **Add note**.
7. You can select the note type, contact type, and contact reference.
8. Enter the description for the note.
9. You can select the label as **High priority** or **Internal**. The applied label is then used to filter notes.
10. Click **Save**.
11. If you want to update any note, open the note and click the pencil icon.
12. If you want to delete any note, open the note and click the delete icon.

Creating orders from customer profile

You can help customers create orders from the home page or from the customer details page.

Procedure

1. Search for the customer.
2. To create an order for the customer, click **Actions** and then click **Create order**.
3. The customer details are displayed in the create order page.
4. Click **Next** to proceed with the order creation.
5. In the **Add products** tab, search for the products and then add the products to the cart.

   The items are added to the cart and the pricing summary is displayed.

   Click **View cart** to view the items that are added to the cart. If you want to remove any items from the cart, select the lines, and then click **Remove lines**.
6. Click **Next**.
7. In the **Fulfillment and review** tab, complete the following steps:
   - Select the shipping option according to the customer requirement.
   - Verify the shipping address with the user or use the edit icon to add another address.
   - Select the level of service for the order. You can also select different levels of service for the order lines based on customer's preference. Based on the selected level of service, charges might vary.

     Note: Multiple shipments are created based on the fulfillment option and the level of service.
8. On the **Fulfillment and review** tab, you can perform the following actions for single or multiple order lines.

   Select single or multiple order lines, click **More actions**, and then perform one of the following tasks:

Action	Description	Reference
• **Change to pickup** • **Change to shipping**	Change the fulfillment option from ship to pick or pick to ship.	"Changing fulfillment options" on page 19
Change pickup recipient	If the fulfillment method is Pickup, you can update the pick up recipient if the order is to be picked up on behalf of the customer.	"Changing pickup details" on page 20
Adjust pricing	You can apply coupons and promotions, discounts, or charges on the order.	• "Applying coupons and promotions" on page 16 • "Applying discounts and charges for orders" on page 16
Gift options	You can apply gift options to the order lines.	"Applying gift options" on page 18
Manage instructions	You can add instructions for the order based on the customer request.	"Adding order instructions" on page 21
Override price	You can override the price for an item while creating an order.	"Overriding prices" on page 17
Add or view notes	You can add and view notes for the order.	

9. Click **Next**.
10. In the **Payment details** tab, select a payment method or add a payment method to make the payment for the order according to the customer's preference.
11. If the funds are sufficient in the selected payment method, click **Confirm order**.

Creating returns without receipts

When customers do not have the receipt and if the organization accepts such returns based on their return policy, customers can return such products without the receipts. You can help customers create returns without receipts by using IBM Sterling Call Center.

About this task

You can create return without receipts on the home page or from the customer profile page.

Procedure

1. On the home page, click **Create return without receipt**.
2. Select an enterprise and click **OK**.
3. In the **Create return** wizard, select a customer, create a customer, or proceed without the customer profile, and click **Next**.

   If you want to create a return without receipt for a customer, open a customer profile, and then click **Create return without receipt** option from the **Actions** menu.
4. Search or browse the product catalog and then add products for return.
5. Click **Next**.
6. On the **Products to return** page, select the option to return or return and exchange the products.

What to do next

Based on the selected option, you can further process the return or return and exchange of the products.

Alerts management

Alerts are usually triggered by the system during the order fulfillment process and are assigned to specific queues based on the configuration for alerts. When CSRs subscribe to the queues, they can view the alerts in the queues. CSRs can self-assign the alerts, work on the assigned tasks, and resolve the alerts.

Alerts are displayed on the home page. You can create and search alerts, view alert details, view alerts that are assigned to you, and view alerts that need follow-up on the current day. You can also view the alerts by queue and alerts by type based on your subscription.

Viewing alert count

As a supervisor or a CSR, you can view the alert count on the home page and in the order, return, and customer details page. Alerts help you track important tasks that might need your attention and action.

Procedure

1. On the home page, open any of the following alerts list.
   - Your assigned alerts
   - Alerts for follow-up on the current day
   - Alerts by queue
   - Alerts by exception type
2. You can also view the alerts for orders, returns, or customers in the order, return, or customer details page.

Creating alerts

You can manually create alerts for orders, returns, and customers to address any issues or can create an alert for other tasks and can assign the alert to a user.

About this task

You can create an alert from the home page or from the order details, return details, or the customer details page.

Procedure

1. On the home page, under the **Alerts** section, click **Create alert**.
2. Select the **Enterprise** for which you want to create an alert.

   Note: If you create an alert from the order details, return details, or customer details page, the Enterprise is selected by default. If required, you can change the Enterprise.
3. Select the **Alert type**.
4. Assign the alert to a queue.
5. Optional: Set the priority of the alert so that the assigned user can prioritize their tasks.
6. Optional: Assign the alert to a user. You can search the user by using the **Advanced search** option.
7. Optional: Select the follow-up date for the alert.
8. Optional: In the **Association** section, select **Order**, **Return**, or **Customer** if you want to associate the alert to a particular order, return, or customer record.

   If you select any of these options, you can enter the order number, return number, or customer ID to associate the alert.

Note: If you create an alert from the order details, return details, or customer details page, the order number, return number, or customer ID is displayed. If required, you can change these details.

You can also select **None** if you want to create an alert for another task.

9. Enter the **Description** for the assigned user to complete the task effectively.

Searching alerts

As a supervisor or a CSR, you can search for alerts and take appropriate actions.

Procedure

In the **Alerts** section, click **Advanced search**, enter the search criteria, and search for the alerts.

In the alerts list page, you can use the filters to narrow the search results and can also use the search bar to search for alerts by order or return number.

Managing alerts

As a supervisor or a CSR, you can view the alerts and the alert details, assign the alerts to queues, assign the alerts to yourself or others, change the follow-up date, and update the alert status.

About this task

You can manage alerts from the **Alerts** section on the home screen. You can also manage the alerts from the order, return, and customer details page.

- "Managing alerts for orders" on page 24
- "Managing alerts for returns" on page 31
- "Managing alerts for customers" on page 36

Procedure

1. On the home page, open any of the alerts lists.
2. Click the alert ID to view the alert details.
3. On the **Alert** page, complete any of following actions.

   Priority
   Update the priority of the alert based on the business needs.

   Status
   Update the alert status to **Open**, **Work in progress**, or **Closed**.

   Added to queue
   Update the queues to which you want to add the alert.

   Assigned to user
   Update the assignee for the alert. You can assign an alert to yourself or another user.

   Follow up date
   Update the follow-up date for the alert. The assigned user can follow up on the alert based on the follow-up date.

   Details
   Enter or update the alert details.
4. Click **Save** to save the changes for the alert.

Results

The alerts are displayed on the home page based on the subscribed queues and user assignments.

Assigning alerts

As a supervisor or a CSR, you can view the alerts by queue or by exception type and can assign the queues to yourself or to other users, based on your work area and permissions.

Procedure

1. On the home page, open a list of alerts by queue or by exception type.
2. On the alert details page, assign an alert.
    - To assign an alert to yourself, click **Assign to me**.
    - To assign an alert to another user, search for the user and select a user.

   You can also assign an alert on the alerts list page.

    - To assign a single alert, click the overflow menu for the alert, and click **Assign to me** or **Assign to user**.
    - To assign multiple alerts, select the alerts and click **Assign to me** or **Assign to user**.
3. Click **Save**.

Results

The alert list is refreshed, and the **Assigned to** column reflects the name of the assignee. The alerts that are assigned to you are also displayed in the **My assigned alerts** list.

Marking alerts as work in progress

As a supervisor or a CSR, you can view the alerts and can change the alert status to **Work in progress** when you work on the alert.

Procedure

1. On the home page, open an alerts list.
2. Open the alert that you want to mark as **Work in progress**.
3. Change the status of the alert to **Move to in-progress**, and then click **Save**.

   You can also use the overflow menu to change the alert status to work in progress.

    - If the alerts list contains an alert in the **Open** status, click the overflow menu and click **Move to in-progress**.
    - To mark multiple alerts, select alerts that are in the **Open** status, and click **Move to in-progress**.

Results

The alert is refreshed and the **Status** column reflects the updated status of **Work in progress**.

Resolving alerts

As a supervisor or a CSR, you can resolve an alert after the associated task is completed.

Procedure

1. On the home page, open an alerts list.
2. Open the alert that you want to resolve.
3. Change the status of the alert to **Closed** and then click **Save**.

   You can also use the overflow menu to change the resolve an alert.

    - To resolve a single alert, click the overflow menu for the alert, and click **Resolve alert**.
    - To resolve multiple alerts, select the alerts and click **Resolve alert**.

Results

Resolved alerts are removed from the **My assigned alerts** list and the alerts list.

Managing alert notes

Alert notes are added to the alerts by the system for various events. You can also add notes manually. You can view all the notes in the **Notes** panel.

Procedure

1. In the **Alerts** section, open an alert.
2. In the **Notes** panel, view all notes.

   You can filter the notes by using the following filter criteria:

   - System
   - User
   - High priority

   You can also search by keywords in the available notes.
3. To add notes manually, click **Add note**.
4. Select the note type, contact type, and contact reference.
5. Enter the description for the note.
6. Select the label, such as **High priority** or **Internal**, that is used to filter notes.
7. Click **Save**.
8. If you want to update any note, open the note and click the pencil icon.
9. If you want to delete any note, open the note and click the delete icon.