

Cancel Sales Order (Zero Shipment)

When a sales order cannot be shipped due to a 100% inventory shortage, the sales order should be canceled in EVP; this will trigger EVP to communicate the cancellation to the relevant sales channels. Based on the sales channel, this will typically trigger a 100% refund to the customer. If this is not the case, the user must also ensure the refund is performed on the sales portal.

Alternatively, for sales channels with robust API integration (Amazon, Walmart, Shopify, etc.), it is possible to cancel the sales order on the sales channel, and EVP then import the termination event; however, this is not a recommended approach if the sales order has been released to fulfillment via 3PL, WMS, Drop Ship, etc.

Depending upon the order's status with EVP and its progress through its fulfillment cycle, the required cancelation or completion process will vary.

Order State	Possible Hold Codes	Required Clean-up Process
Order loaded into EVP, but no fulfillment action performed	Hold, Release, Out of Stock, 3PL: Send, DS: Send, CD: Order, Pick, Partial	Cancel Sales Order Process Scenario 1
Order loaded into EVP, and fulfillment is in process	Hold, 3PL: Confirm, DS: Confirm, CD: Confirm, Ship	Cancel Sales Order Process Scenario 2
Order loaded into EVP, and fulfillment is partially complete	Hold, Out of Stock, 3PL: Confirm, DS: Confirm, CD: Confirm, Ship	Complete Sales Order Process Scenario 1

While the hold codes provide high-level guidance on the sales order status when performing a cancelation, the user should review the sales order history to understand the actions performed on the sales order fully.

Sales Order (SO-220002021-MC) Event History				×
<div> <div></div> <div>30 90 All</div> </div> <div>Y</div>				
Time	Event T...	User		Message
12/15/2022 08:17	Order	Nigel		Shipping Address Validation Success - Residential = True
12/15/2022 08:17	Order	Nigel		Updated Ship-To Address from Validation Service
12/15/2022 08:17	Fulfillment	Nigel	🔍	Ideal fulfillment analysis: Success
12/15/2022 08:17	Allocation	Nigel		Allocate 2 EACH to 3348-810050901895
12/15/2022 08:17	Hold Code	Nigel		Hold Code '3PL: Send' Applied: Status Updater Update
12/15/2022 08:17		Nigel		Begin: 3PL: Send (Evp.Server.BlueYonder.Supplier.FulfillmentOrderSender)
12/15/2022 08:17	Fulfillment	Nigel	🔍	Fulfillment Assignment - Success
12/15/2022 08:17	Order	Nigel		Loaded from file \\etail.rs\Files\Accelerate360\Channels_Sales\ACC360_DOD_Mercatalyst\ProcessSales...
12/15/2022 08:43		Nigel		End: 3PL: Send (Evp.Server.BlueYonder.Supplier.FulfillmentOrderSender)
12/15/2022 08:43		Nigel		Begin: 3PL: Confirm (Evp.Server.BlueYonder.Supplier.FulfillmentOrderSender)

Cancel Process Scenario 1 - Not Released to Fulfillment

To cancel a sales order in EVP that has had no fulfillment activities performed on it, follow the steps indicated in the instructions and illustrated in the following screen prints.

Steps	Step Details
1	<p>Upon entering EVP, navigate to the Sales screen.</p> <ul style="list-style-type: none"> Click Sales Module or select favorites as needed to navigate the required sales order screen Enter your order number into the search window and press enter OR find your order number from your list of Sales Orders. NOTE: You may click on the column heading to order these by date, order number, hold code, etc. NOTE: You may select different filter criteria to limit the number of orders displayed, i.e., filter by Hold Code = 3PL_Confirm

EtailSolutions Favorites

All Open Orders All Issues All Fulfillment Orders All Master Skus Fulfilled Orders

Cancel Orders Manual All Actions

Search... 12/13/2022 - 01/12/2023

Sales Order N...	Order Date	Hold Codes	Latest Ship D...	Channel Name	Items	Shipping Ser...	Ship
<input type="checkbox"/> MC-UAT-0042	12/15/22 3:17 AM	3PL: Confirm	12/16/22 11:59 PM	DOD Mercatalyst...	3348-81005090...	Standard	Joh
<input checked="" type="checkbox"/> CS439090507	12/14/22 12:00 A...	3PL: Confirm	12/15/22 11:59 PM	DSV Wayfair (AC...	3348-81005090...	Standard	Kait

2 records 1 selected 12/13/22 - 1/12/23 Hold Code: 3PL: Confirm Order Status: Open Fulfillment Ship Location: BY WMS (San Antonio TX)

Line Items	Ordered	Allocated	Shipped
ISL90189 Rainbow Spoon 3 Pack	1	1	0

Information

Order Number SO-220002028-WF
Sales Order Number CS439090507

Totals

Price	19.99
Tax	0.00
Shipping	0.00
Total	19.99

Event History

Ideal fulfillment analysis: Success - Nigel on 12/15/22 10:23 AM
Shipping Address Validation Success - Residential - True - Nigel on 12/15/22 10:23 AM
Updated Ship-To Address from Validation Service - Nigel on 12/15/22 10:23 AM
Allocate 1 EACH to ISL90189 - Nigel on 12/15/22 10:23 AM
Hold Code 3PL: Send Applied: Status Updater Update - Nigel on 12/15/22 10:23 AM
See All
Ship To Address

2

Option 1 is to select multiple orders from the list screen and then select the cancel orders menu option

Cancel Orders Manual All Actions

Search... 01/13/1973 - 01/13/2023

Sales Order N...	Order Date	Hold Codes	Latest Ship Da...	Channel Name	Items	Shipping Servi...	Shipto Name	Total
<input checked="" type="checkbox"/> MC-UAT-0026	12/12/22 10:08 AM	3PL: Confirm	12/13/22 11:59 PM	DOD Mercatalyst...	3298-41201 334...	Standard	Fred Smith	\$27.99
<input type="checkbox"/> MC-UAT-0029	12/12/22 10:08 AM	3PL: Confirm	12/13/22 11:59 PM	DOD Mercatalyst...	3348-810050901...	Standard	Bridget Smith	\$29.98
<input checked="" type="checkbox"/> MC-UAT-0030	12/12/22 10:08 AM	3PL: Confirm	12/13/22 11:59 PM	DOD Mercatalyst...	3280-20049 33...	Standard	Mike Smith	\$29.98
<input type="checkbox"/> MC-UAT-0019	12/6/22 11:04 AM	3PL: Confirm	12/6/22 11:59 PM	DOD Mercatalyst...	3348-810050901...	Standard	Harry Smith	\$29.98

The user will be prompted to confirm the action

Orders Cancelled

Sales Orders
SO-220002021-MC
SO-220002028-WF

Continue

Once confirmed, the order will be canceled in EVP

All Open Orders All Issues All Fulfillment Orders All Master Skus Fulfilled Orders

Cancel Orders Manual All Actions

Search... 01/13/1973 - 01/13/2023

Sales Order N...	Order Date	Hold Codes	Latest Ship Da...	Channel Name	Items	Shipping Servi...	Shipto Name	Total
<input type="checkbox"/> S08859505	12/14/22 12:00 AM		12/15/22 11:59 PM	MP Boxed (ACC3...	3350-810050901...	Standard	Nancy Ray	\$105.28
<input type="checkbox"/> 200010500360370	11/21/22 1:21 PM		11/22/22 11:59 PM	MP Walmart (AC...	3235-MAG74278	Standard	colette campbell	\$16.26
<input type="checkbox"/> MC-UAT-0042	12/15/22 3:17 AM		12/16/22 11:59 PM	DOD Mercatalyst...	3348-810050901...	Standard	John Smith	\$39.98
<input type="checkbox"/> CS439090507	12/14/22 12:00 AM		12/15/22 11:59 PM	DSV Wayfair (AC...	3348-810050901...	Standard	Kaitlin Moyers	\$19.99
<input type="checkbox"/> MC-UAT-0030	12/12/22 10:08 AM		12/13/22 11:59 PM	DOD Mercatalyst...	3280-20049 33...	Standard	Mike Smith	\$29.98
<input type="checkbox"/> MC-UAT-0026	12/12/22 10:08 AM		12/13/22 11:59 PM	DOD Mercatalyst...	3298-41201 334...	Standard	Fred Smith	\$27.99

Multi Item

☐ Yes
☐ No

Hold Code

☐ 3PL Confirm
☐ Out of stock
☐ Hold

Order Status

☒ Cancelled

3

Option 2 is to open up the sales order details and perform the cancel activity on a single order.

Sales Order (SO-220001911-MC)

Edit

Cancel Order

Duplicate Order

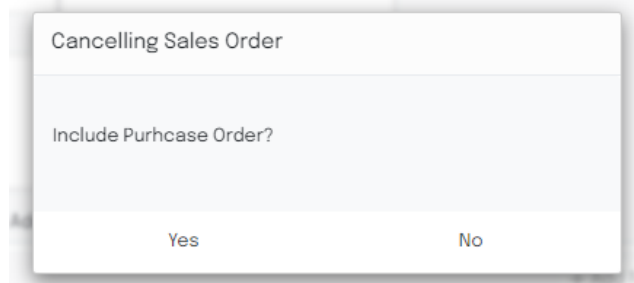
IMPORTANT NOTES:

1. EVP will publish cancel to Amazon, eBay, Google, NopCommerce, Shopify, and Walmart sales channels.
2. When EVP publishes a cancellation to Amazon, a default cancellation reason of "Buyer Cancelled" will be sent. You must cancel the order directly on Amazon **AS WELL AS** in EVP to use a different cancellation reason.
3. When an order is canceled for an EDI-based Drop Ship Vendor sales channel, the information in the 856 and 810 will indicate that a zero shipment occurred.
4. Other channels, such as Abe, Alibris, BigCommerce, Magento, NewEgg, Overstock, etc., will need to have the order canceled directly on your seller portal **AS WELL AS** in EVP

Cancel Process Scenario 2 - Released to Fulfillment

To cancel a sales order in EVP that has not been released to fulfillment activities, follow the steps indicated in the instructions and illustrated in the following screen prints.

Steps	Step Details
1	<p>Before performing any cancellation action on a sales order that has had any fulfillment action performed on it, ensure that the items are not shipped before canceling the order. This ensures you do not incur costs on a sales order that will be refunded to the customer.</p> <p>Typically the business goal is to reject any cancel request once fulfillment has started, but if desired, the user will need to check with the 3PL, warehouse, or supplier to request that they do not ship the order.</p>
1	Once this validation step is complete, the user should follow the steps outlined in the prior procedure to find one or more orders that need to be canceled and submit the request.
2	If there is an open 3PL fulfillment (3PL: Confirm) or drop-ship (DS: Confirm) purchase order associated with the sales order, a user prompt will be displayed to confirm that the purchase order associated with the sales orders



Optional Post-Cancellation Email Notification

For sales channels that do not support integrated cancelation notification, EVP can be set up to send a notification email with details of the orders that were canceled.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Channel	Type	SubType	Condition	Title	Notes	Status	IssueNumber	DocumentNumber	CreatedDate	DueDate	Occurrence	LastOccurrence
2	Abe	Issue	SalesOrder	Cancelled	662015751: Cancelled	Stores Service on 1/4/2023 8:00:57 AMOrder 662015751 on marketplace Abe h New		ISU-235414806	662015751	1/4/2023		1	1/4/2023
3	Abe	Issue	SalesOrder	Cancelled	661606369: Cancelled	Stores Service on 1/4/2023 8:00:57 AMOrder 661606369 on marketplace Abe h New		ISU-235414807	661606369	1/4/2023		1	1/4/2023
4	Abe	Issue	SalesOrder	Cancelled	661721381: Cancelled	Stores Service on 1/4/2023 8:00:57 AMOrder 661721381 on marketplace Abe h New		ISU-235414808	661721381	1/4/2023		1	1/4/2023
5	Abe	Issue	SalesOrder	Cancelled	661993597: Cancelled	Stores Service on 1/4/2023 8:00:57 AMOrder 661993597 on marketplace Abe h New		ISU-235414809	661993597	1/4/2023		1	1/4/2023
6	Abe	Issue	SalesOrder	Cancelled	661961133: Cancelled	Stores Service on 1/4/2023 8:00:57 AMOrder 661961133 on marketplace Abe h New		ISU-235414810	661961133	1/4/2023		1	1/4/2023
7	Abe	Issue	SalesOrder	Cancelled	661930970: Cancelled	Stores Service on 1/4/2023 8:00:57 AMOrder 661930970 on marketplace Abe h New		ISU-235414811	661930970	1/4/2023		1	1/4/2023
8	Abe	Issue	SalesOrder	Cancelled	661952193: Cancelled	Stores Service on 1/4/2023 8:00:57 AMOrder 661952193 on marketplace Abe h New		ISU-235414812	661952193	1/4/2023		1	1/4/2023
9	Abe	Issue	SalesOrder	Cancelled	661830002: Cancelled	Stores Service on 1/4/2023 8:00:57 AMOrder 661830002 on marketplace Abe h New		ISU-235414813	661830002	1/4/2023		1	1/4/2023