

Complete Sales Order (Partial Shipment)

When a sales order cannot be shipped fully due to a partial inventory shortage, once all the possible items have been shipped, the Sales Order should be marked complete in EVP; this will trigger EVP to communicate the partial fulfillment details to the relevant sales channel. Based on the sales channel, this will typically trigger a partial 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 complete 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 within 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 (link)
Order loaded into EVP, and fulfillment is in process	Hold, 3PL: Confirm, DS: Confirm, CD: Confirm, Ship	Cancel Sales Order Process Scenario 2 (link)
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> <div>30</div> <div>90</div> <div>All</div> </div> <div> <div></div> <div></div> </div> </div>				Y
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)

Complete Sales Order Process Scenario 1: Partial Fulfillment is Complete

To complete a sales order in EVP that has completed its partial fulfillment, 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 View

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 Mercataly...	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

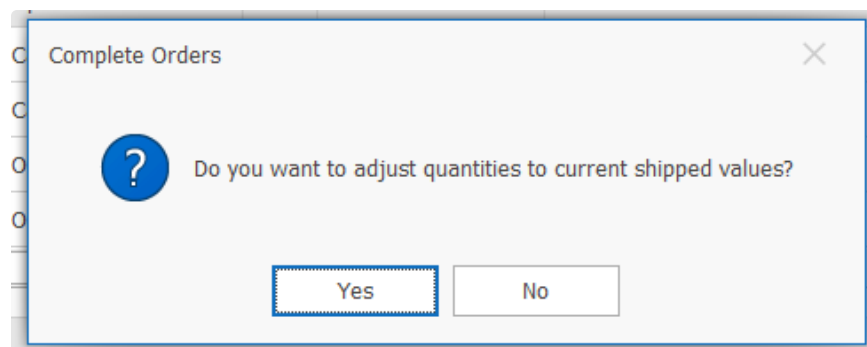
Option 1 is to select multiple orders from the list screen and then select the Complete menu option

Cancel Orders Manual Complete Orders All Actions

Search... 01/26/1973 - 01/26/2023

Sales Order N...	Order Date	Hold Codes	Latest Ship Da...	Channel Name	Items	Shipping Servi...	Shipto Name	Total
<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 type="checkbox"/> MC-UAT-0013	12/5/22 11:04 AM	3PL: Confirm	12/6/22 11:59 PM	DOD Mercatalyst...	3348-810050901...	Standard	Harry Smith	\$29.98
<input type="checkbox"/> MC-UAT-0011	12/5/22 4:05 AM	3PL: Confirm	12/6/22 11:59 PM	DOD Mercatalyst...	3348-810050901...	Standard	Don Smith	\$19.99
<input checked="" type="checkbox"/> 200010635307607	12/4/22 10:48 PM	3PL: Confirm	12/5/22 11:59 PM	MP Walmart (AC...	3349-810050901...	Standard	Gina McQueen	\$101.13
<input type="checkbox"/> 200010641638507	12/4/22 7:19 PM	3PL: Confirm	12/5/22 11:59 PM	MP Walmart (AC...	3362-850031280...	Standard	Joe Monahan	\$33.06
<input checked="" type="checkbox"/> 200010553244838	12/4/22 12:08 AM	3PL: Confirm	12/5/22 11:59 PM	MP Walmart (AC...	3349-810050901...	Standard	Sandra Crusch	\$31.92
<input type="checkbox"/> 200010528146656	12/3/22 10:41 PM	3PL: Confirm	12/5/22 11:59 PM	MP Walmart (AC...	3347-8100509019...	Standard	Tanya Learning	\$30.54
<input type="checkbox"/> 200010510481018	12/3/22 11:42 AM	3PL: Confirm	12/5/22 11:59 PM	MP Walmart (AC...	3284-200276	Standard	Rose Wolfensbe...	\$10.59

The user will be prompted to confirm the action



Once confirmed, the sales order will be completed by decrementing the sales order line qty to match the shipped qty, via the creation of a sales order adjustment record.

Sales Order (SO-220001891-WTM)
✕

Edit

Cancel Order Duplicate Order

General

Order Number
SO-220001891-WTM
EVP Order Status
Fulfilled
EVP Shipping Service Level
Standard
Hold Codes

MP Walmart (ACC360)

Order Number
20001053244838
Order Status
Open
Requested shipping Method
Standard

BY WMS

BY WMS Order Number
SO-220001891-WTM
BY WMS Order Status
Open

Totals (USD)

Line Item Price 29.97
Line Item Shipping 0.00
Order Level Shipping 0.00
Line Item Tax 1.95
Order Level Tax 0.00
Total 31.92

Addresses

Ship To

Line Items

Shipments Event History Notes Dates Additional Detail

IMPORTANT NOTES:

1. Once a sales order has been marked complete - fulfillment details for the partial shipment will be communicated to the relevant sales channel; however, typically, this does not mark the sales order fulfilled or generate a refund. These steps will need to be manually performed on the sales channel. This action is typically performed by the individual marking the sales order complete in EVP.
2. When an order is completed for an EDI-based Drop Ship Vendor sales channel, the information in the 856 and 810 will indicate that a partial shipment occurred.
3. On the Shopify sales channel, sales order line item adjustments and a partial refund can be enabled via EVP’s integration capabilities.

Optional Post-Completion Email Notification

For sales channels that do not support integrated refund integration, EVP can be set up to send a notification email with details of the orders that were completed and need to be adjusted/refunded on the sales channel.

	Issue Number	Type	Document Number	Subtype	Condition	Status	Priority	Channel Name	Title	Due Date	Notes	Last	#	Created	
	ISU-214319059	Issue	18-07258-07001	SalesOrder	Adjusted	Closed	Normal	eBay BBS	18-07258-0...			7/5/2021 1...	1	7/5/2021 1...	
▶	ISU-214319060	Issue	18-07260-44208	SalesOrder	Adjusted	Closed	Normal	eBay BBS	18-07260-4...			7/5/2021 1...	1	7/5/2021 1...	
	ISU-214327583	Issue	05-07250-44889	SalesOrder	Adjusted	Closed	Normal	eBay BBS	05-07250-4...			7/8/2021 1...	1	7/8/2021 1...	
	ISU-214328159	Issue	10-07248-18601	SalesOrder	Adjusted	Closed	Normal	eBay BBS	10-07248-1...			7/9/2021 1...	1	7/9/2021 1...	
	ISU-214362636	Issue	633447581	SalesOrder	Adjusted	Closed	Normal	Abe	633447581:...			7/14/2021 ...	1	7/14/2021 ...	
	ISU-214362637	Issue	633499533	SalesOrder	Adjusted	Closed	Normal	Abe	633499533:...			7/14/2021 ...	1	7/14/2021 ...	
	ISU-214362638	Issue	633543354	SalesOrder	Adjusted	Closed	Normal	Abe	633543354:...			7/14/2021 ...	1	7/14/2021 ...	
	ISU-214362639	Issue	633624902	SalesOrder	Adjusted	Closed	Normal	Abe	633624902:...			7/14/2021 ...	1	7/14/2021 ...	