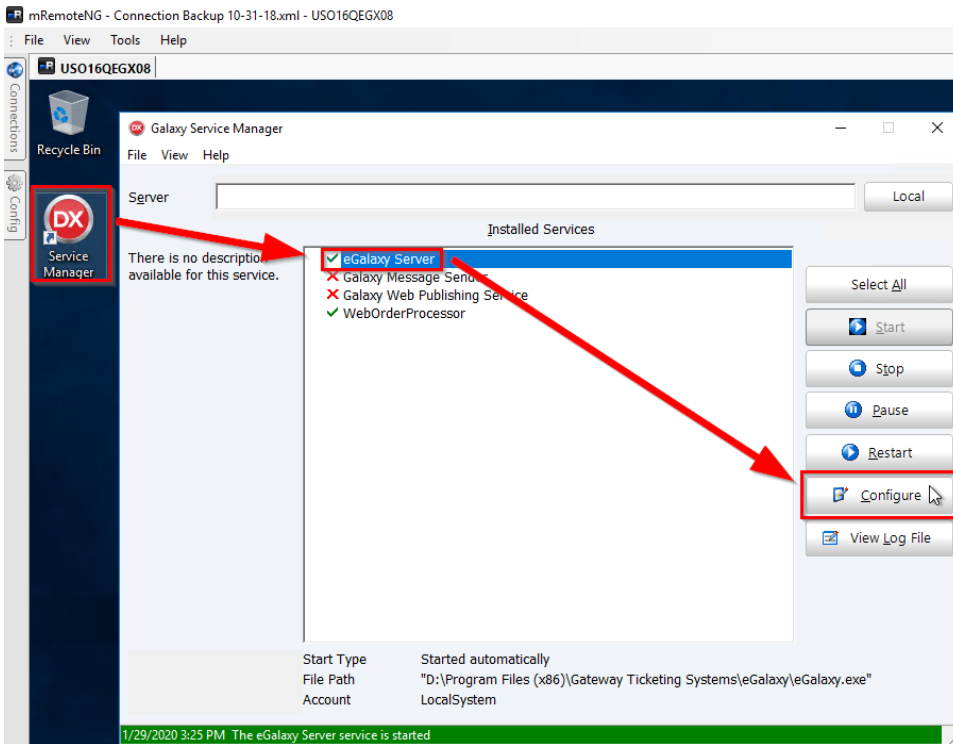# SmartOrder 2.0 Creating New Client (USH & UO)
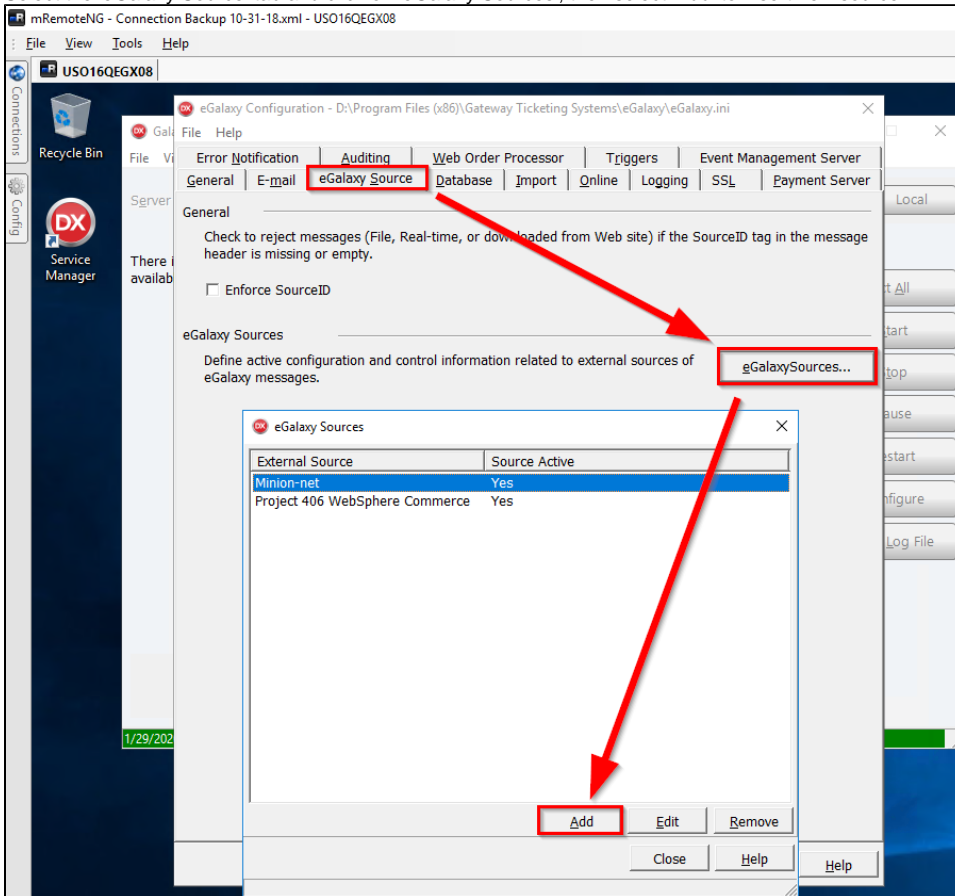
How to create a new smart order client

Process Flow

1. Log into a QA & Production eGalaxy servers and open Service Manager. Click on eGalaxy Server to highlight it, then click the 'Configure' button.

2. Select the 'eGalaxy Source' tab and click on 'eGalaxy Sources', then select 'Add' to insert new source.

3. On the General Tab, under the Source section, define the External Source ID. The customer name should have been included in the email in the request ticket.
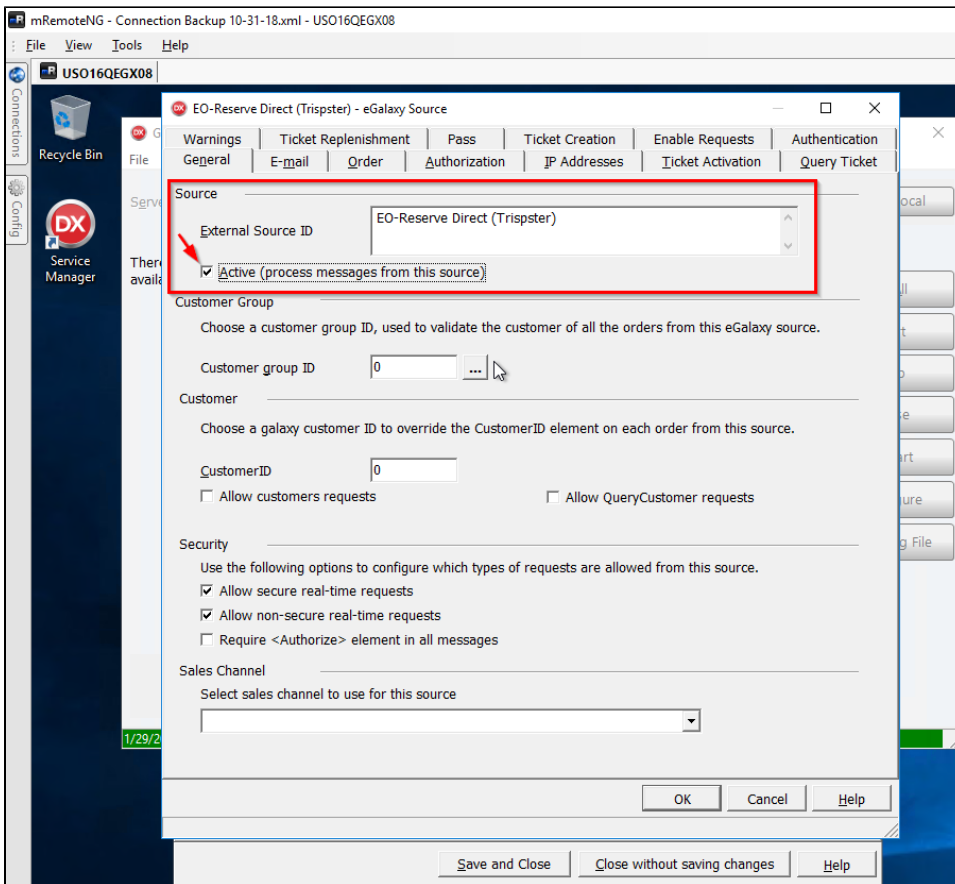
> (i) **Note**
>
> External Source ID begin with EO- , followed by the full name.
>
> So if the client name is **"Attraction World"**, then the external source ID will be **"EO-Attraction World"**.
>
> **Other E.g:** EO-Customer_Name | *EO-Smart Order | EO-Expedia | EO-JetBlue*

Then check mark "Active (process messages from this source)" underneath the text box.

4. Select the '…' next to 'Customer group ID'. Here you can find the Customer Groups for existing clients. Check your request for your Smart Order client number.

   In this example, we noticed that 'Reserve Direct' is already here. Selecting 'Edit' button shows the Description and the Client Number 105286. This would be the same if you were to select 'Add', but you would enter in the Description and the Client Number.
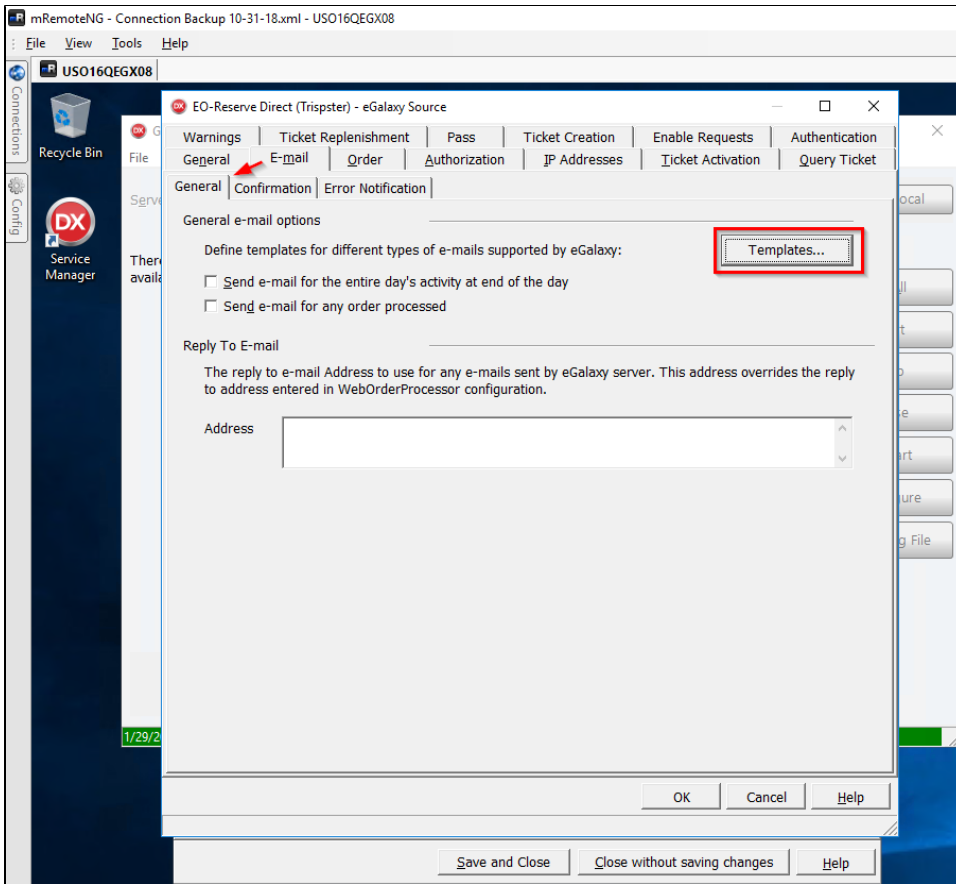
   Once done, Highlight your new Customer group and select OK, working your way back to the 'General' page.
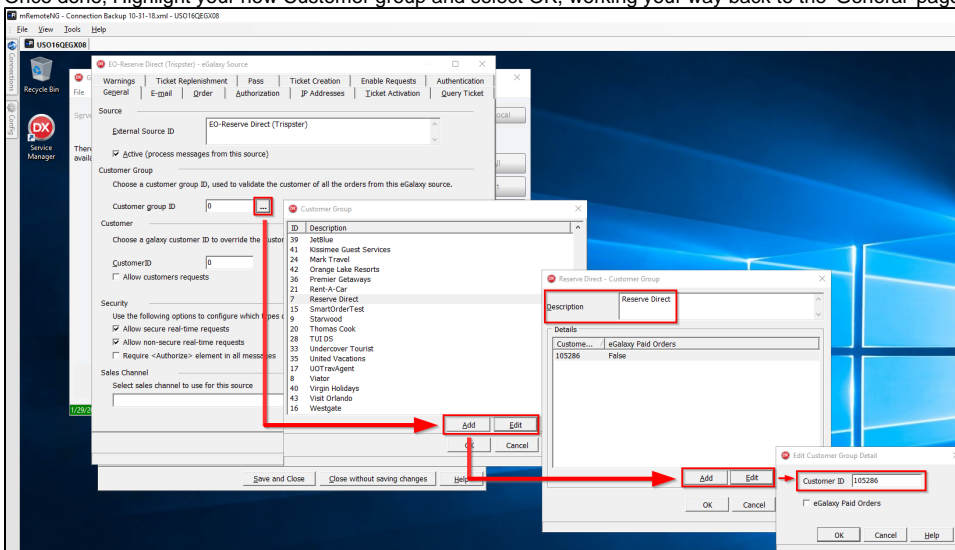
> ⊘ **Note**
>
> If an error says that the CustomerID/Client# does not exist in Galaxy, contact the Sales rep

5. Next, go to the 'E-mail' Tab, followed by the 'Genera'l' Sub-Tab, then select the 'Templates' button.

6. Click the "Error notification e-mail template" option on the left pane, then copy/paste the below text into the box:

> ⓘ **Note**
>
> You will have to change the name of the client in the subject line!

Error E-Mail Template

```
<%MessageSubject = 'SmartOrder Import Error - EO-[YOUR CLIENT NAME] '%>
========================
Universal Orlando Resort
========================
Orders from source <% write (SourceID) %> were processed with some errors.

<%
PrevReference = ''
TicketActivationErrorType = 8
SeverityError = 0
SeverityWarning = 1


if FileName <> '' then writeln(format('Processed File: %s', [FileName]))

for i = 0 to (ErrorCount - 1) do begin
    if (PrevReference <> Reference[i]) then begin
        writeln('')
        if ErrorType[i] = TicketActivationErrorType
            then writeln(Format('VisualID: %s', [Reference[i]]))
            else writeln(Format('OrderID: %s',  [Reference[i]]))
        end
    writeln('Severity ErrorCode ErrorText')
    writeln('-------- --------- ---------')

    if Severity[i] = SeverityError
        then writeln(Format('%8s %9d %s', ['Error', ErrorCode[i], ErrorText[i]]))
```
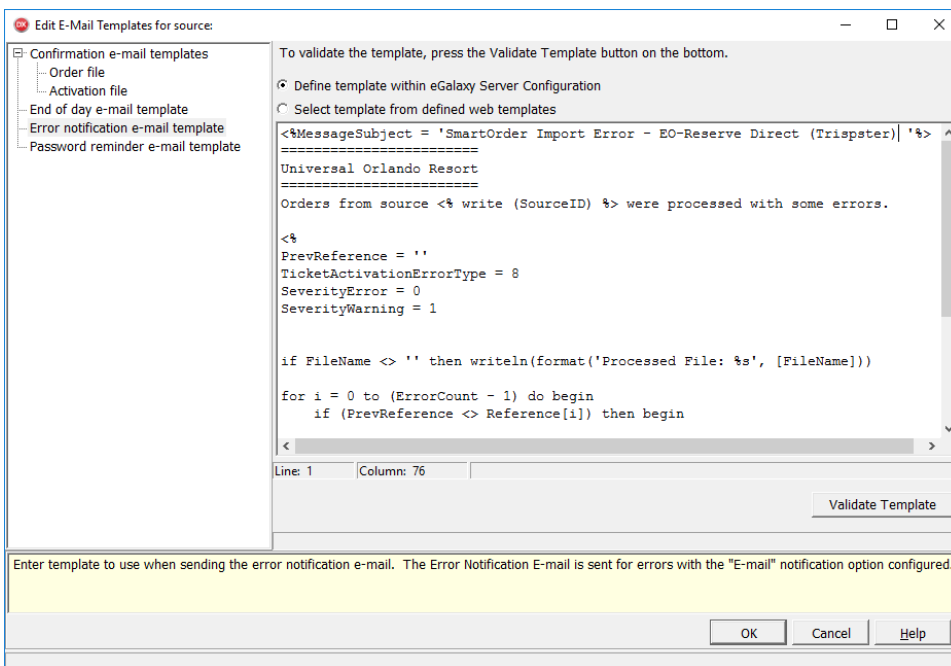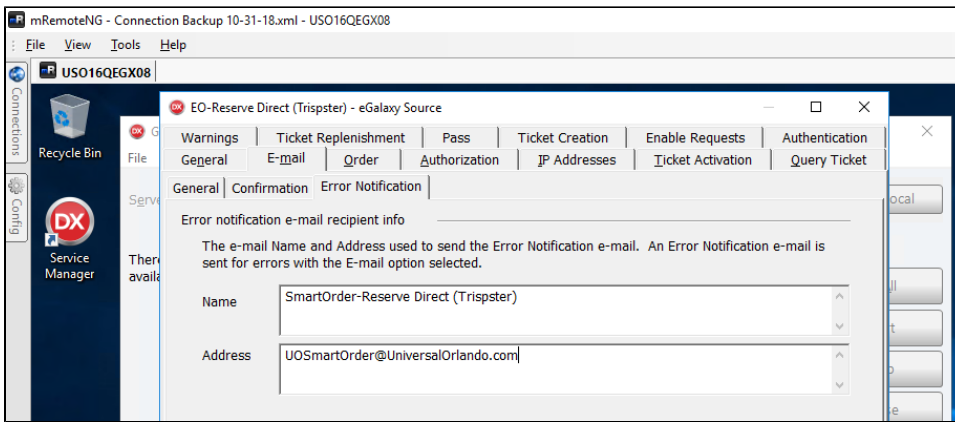
Below is the how the end result should look:

7. Click 'OK', then select the 'Error Notification' Sub-Tab.

   Here we will fill in the name and address of the Error Notification.

   Name: SmartOrder-[Client Name]

   Address: UOSmartOrder@UniversalOrlando.com

8. Switch to the 'Order' tab, and make sure of the following...

   a. If setting up a **UO** Client that will use <u>Instant Fulfillment</u>, **uncheck** 'Create ordercommand when processing Orders request'.
      If setting up a **UO** Client that will use <u>Print@Home</u>, **check** 'Create ordercommand when processing Orders request' and 'Do not require merchant for order confirmation e-mail'.
      If setting up a **USH** using <u>any Delivery Method</u>, **check** 'Create ordercommand when processing Orders request' and 'Do not require merchant for order confirmation e-mail'.
   b. **<u>Check</u>** 'Delete unissued orderlines when processing cancel order request'.
   c. **<u>Check</u>** 'Do not require merchant for order confirmation e-mail'.
   d. **<u>Check</u>** 'Allow cancellations of orders that have been invoiced'.

EO-SmartOrderTest - eGalaxy Source

Tabs: Ticket Replenishment | Pass | Ticket Creation | Enable Requests | Authentication | Update Ticket | IdentificationNo

General | E-mail | Order | Authorization | IP Addresses | Product Activation | Query Ticket | Query Orders | Warnings

Order ID Range

From and Thru range, used to validate the order ID of all orders from this eGalaxy source. Order ID must be between From and Thru range inclusive. These are string fields, even if both of the range values are numeric, the comparison is a string compare.

From [ ]   Thru [ ]

☐ Mark new orders as secure
☐ Allow Pay On Issuance orders

Check below to create an ordercommand for every order in the Orders request processed. When this option is checked, after importing an order system will create an ordercommand for further processing of the order (done by the WebOrderProcessor).

☑ Create OrderCommand when processing Orders request
Contract statement delivery [Include in body of email ▼]
☑ Enforce credit limit when issuing tickets
Send order confirmation e-mail using address on [order contact ▼]

☑ Do not require merchant for order confirmation e-mail
☐ Always use description from Item definition for OrderLines
☑ Always use description from FOP definition for OrderLines
☐ Enforce unique order reference values
☑ Delete unissued orderlines when processing cancel order request
☑ Combine duplicate order contacts
☐ Ignore empty tags for contact fields
☐ Store limited endorsement data
☐ Enable Price Schedules in price validation
☐ Reject orders if required user fields are not present in request
☐ Allow specifying visual IDs on order lines to be used to activate foreign media tickets
☐ Allow Override Of Product Downgrade Rule
☐ Allow QueryOrders with only Group Visit date range provided
☐ Enforce last name for new contacts
☑ Allow cancellations of orders that have been invoiced
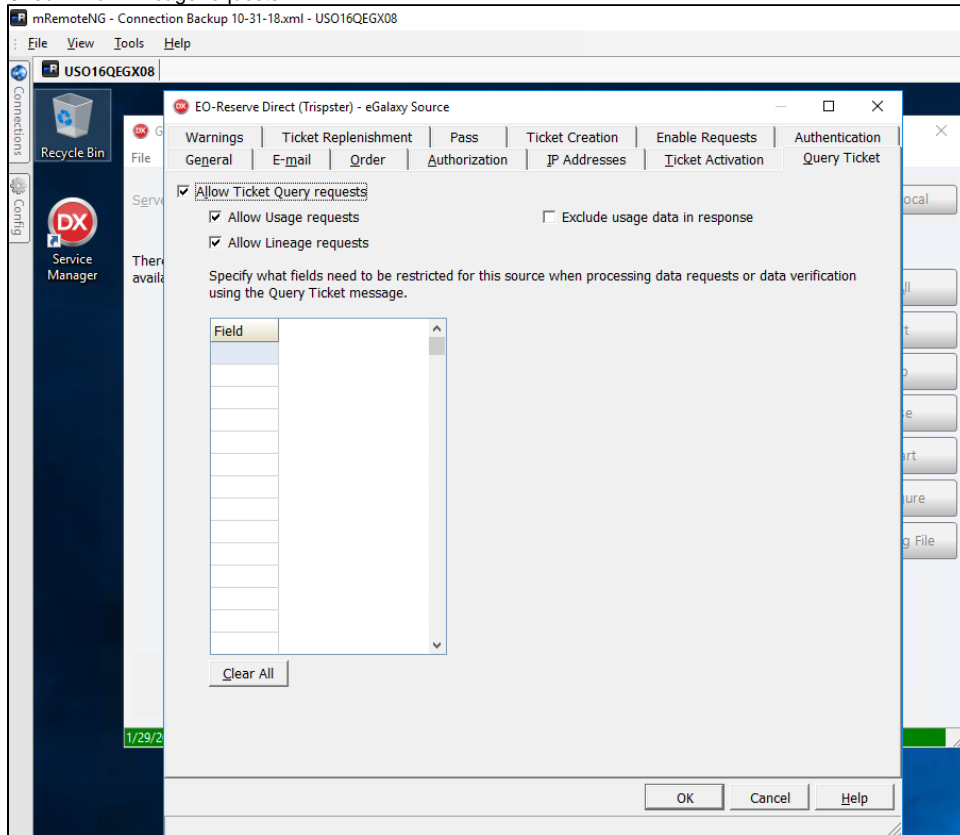☐ Allow updating order status from closed to open

[OK]   [Cancel]   [Help]

e.

9. Now move to the 'Query Ticket' tab, and make sure of the following...

   a. Check 'Allow Ticket Query requests'
   b. Check 'Allow Usage requests'

c. Check 'Allow Lineage requests'

10. Next, on the 'Warnings' tab, change error code 105 to "Warning".

11. Finally, click 'OK', then 'Close', and then 'Close without saving changes' (by this point the source has already been created in the DB, there is no need to save anything)

12. Afterwords, use the following SQL to find the 'eGalaxy Source ID'. Use either QDBGLXY1 or PDBGLXYRPT1 database:
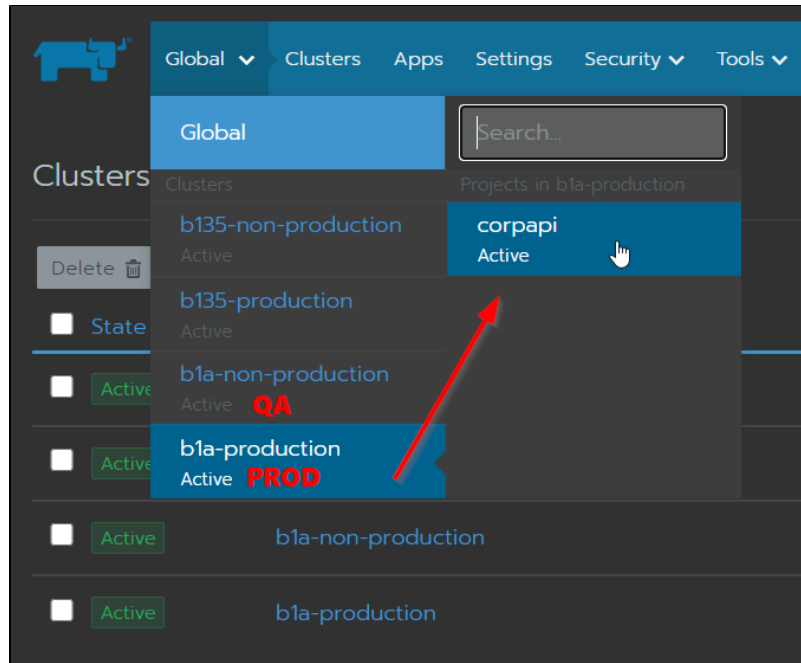
eGalaxy Source ID Look-up

```
select eGalaxySourceID, ExternalSourceID 'Source Name', SourceActive, CustomerGroupID,
PreventOrderCommandCreation, AllowNoCustMerchForConfEmail, DeleteLinesWhenCancelingOrder, *
from eGalaxySources nolock
where ExternalSourceID like 'EO-%'
order by 'Source Name' asc
```

13. Get / Create Credentials

Typically done by our team with Rancher Access
   a. Login to Rancher
   b. (Optional) If you cannot reach Rancher
        i. http://10.18.74.53:30082/Home/Login?ReturnUrl=%2F - UO QA
       ii. http://10.18.74.53:30182/Home/Login?ReturnUrl=%2F - USH STAGE
      iii. http://10.18.78.72:30082/Home/Login?ReturnUrl=%2F - UO PROD
       iv. http://10.18.78.72:30182/Home/Login?ReturnUrl=%2F - USH PROD
   c. Select the CorpAPI environment you need (PROD or QA)

      i.

d. Select the URL under **<u>Manager</u>** from the list
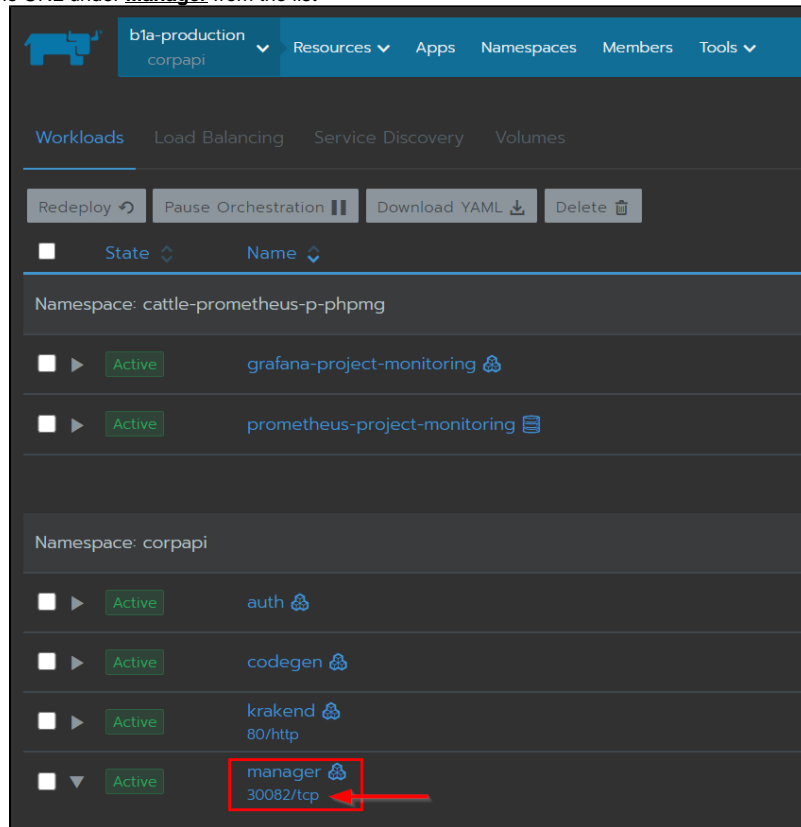
      i.

e. Enter your SSO Login (Same one used for your computer)

i.

f. Select **<u>Application Users</u>** form the top menu.

i.

g. Create New User

i.

h. Use the <u>ExternalSourceID</u> as the UserName, and fake@universalorlando.com as the ContactEmail

i.

i. Add the newly generated ClientSecret to the shared KeePass file. (THIS WILL ONLY SHOW ONCE, IF THIS PAGE IS CLOSED, IT WILL NEED TO BE REGENERATED)

i.
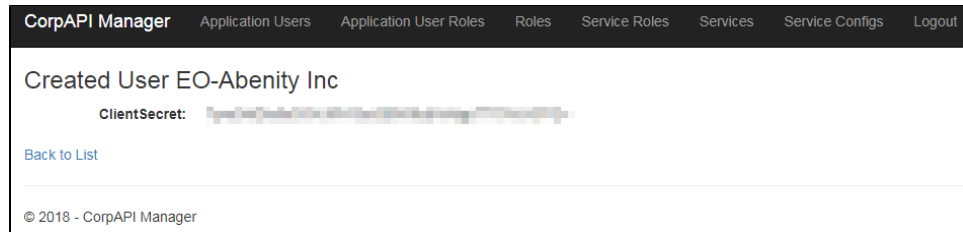
> **ⓘ Note**
>
> If nobody from our team with Rancher access is available, open a request to the **UPTO Intergrations** team to add the ExternalSourceID to CorpAPI Manager UO QA, USH Stage, UO Prod, or USH Prod. They will create the Client ID (same as Source ID) and generate a Client Secret and send it back to you.

14. Send Credentials to Naz and team

New SO Cred Email

```
To: Richardson, Naz (NBCUniversal, Orlando) <Naz.Richardson@universalorlando.com>
Cc: UPT Trade Services <UPTTradeServices@universalorlando.com>
Subject: RE: [NBCU JIRA/SNOW] (UPTC-????/RITM?????????) SmartOrder [UO/USH] - Credential Request - [YOUR
CLIENT NAME]

Hi Naz,

Below are [UO/USH] Smart Order credentials for [CLIENT NAME].

QA/STG:
ClientID : EO-[YOUR CLIENT NAME]
Client Secret : ??????????????????????????????????????????

Prod:
ClientID : EO-[YOUR CLIENT NAME]
Client Secret : ?????????????????????????????????????????? Let us know if you need any more information.

Best,
(Your Name)
```
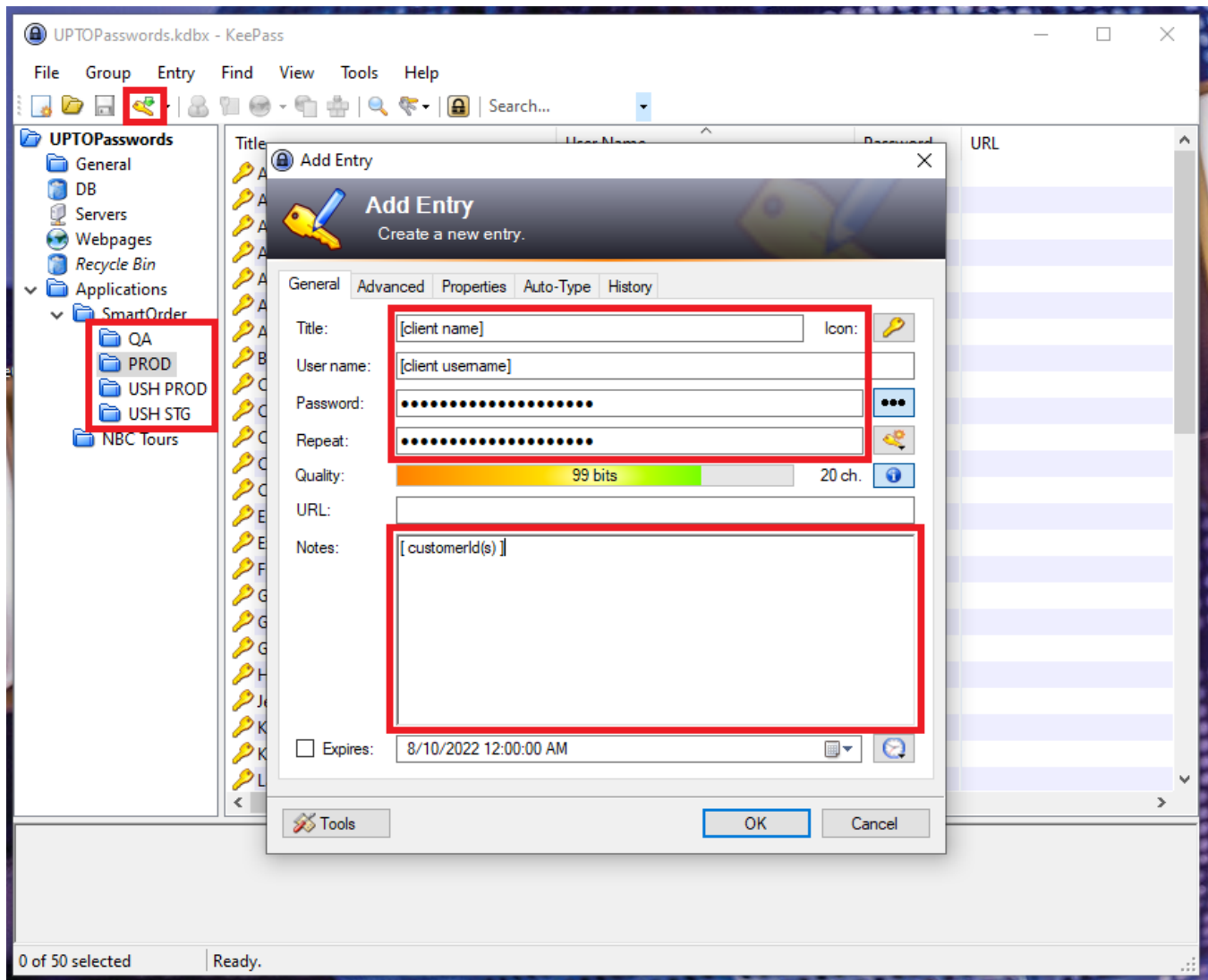
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15. Save credentials in the team's KeePass. Make sure to select the correct environment folder and to include all the customerId(s) for the client in the notes:

You're Done!