Retail Operations Process

About This Document

This document is an attempt to concretely and exhaustively record the steps taken by staff at the GSGCNWI Chicago Shop to fulfill an order from the GSGCNWI Online Store. The data was gathered over a series of interviews with patient staff members who sat for many hours over two weeks to walk through the long and complicated process step by step.

The primary purpose of this document is to ensure that when the store is moved to the new system that no part of the process is unaccounted for. The secondary purpose that arose sometime into the third interview was that this document should serve as an example of how the council still has much progress to make in terms of restructuring itself after the 8 council merger in 2010.

This lengthy document is complex and reveals several problems inherent in the store and the council as a whole:

1. Prohibitively out of date technology
2. Lack of understanding about the technology used, including how it is used and why it is used
3. Lack of new processes to replace old ones in place before the merger in order to compensate for the multiple locations and higher volume

Numbers in parenthesis such as (032) will refer to an accompanying screenshot in the "Retail Operations Process (Screenshots)" folder. Numbers in parenthesis preceded by a URL, such as (http://www.girlscoutsgcnwi.org/volunteer-resources, 016) means screenshot #016 will be of the page at http://www.girlscoutsgcnwi.org/volunteer-resources. **(images omitted in document for security reasons)**

Terms Used

Business Catalyst (BC)	Adobe Business Catalyst, a hosted site generator that runs the online store
Retail Management System (RMS)	Microsoft Dynamics Retail Management System, the inventory and POS system for brick and mortar stores (sometime referred to as "Dynamics", for the purposes of this document, we will use RMS throughout)
Personify	The GSGCNWI membership database, unrelated to the GSUSA membership database
Item Transfer Order (ITO)	A form provided by RMS which indicates stock is being transferred to or from a store's inventory

After a customer has submitted an online order

1. Business Catalyst creates a Workflow item which generates an email detailing the customer's shipping, billing, and order information. This email is sent to everyone in the Role of “shopdonationformadmin” - “elindholm” (which is forwarded to Keith Y.), “kderusha” (which is forwarded to Jennifer F.), and “chicagoshop” - Mary Therese S., Jennifer P. (01).

2. If the customer paid with a credit card, Business Catalyst sends out a second email containing the payment information which is sent only to chicagoshop.

Order Assignment

3. The order emails are dispersed throughout the Outlook inbox with other business emails. In the morning, or during less busy times throughout the day, starting at the oldest (bottom most) online order email, whoever is in the Chicago store will read the Workflow email and begin to process it (71).
    a. If there are any Item Transfer Orders (ITOs) in the inbox, they are printed immediately from the email, or as soon as possible so as not to lose track of them.

4. Scrolling down to the bottom of the email will show a line underneath the items ordered and above the order total which will indicate if this item is for “shipping” or for “pick up at store” at a specific location (72). With the shipping option in mind, a quick scan of the order's items is usually done at this point.

5. In the email, clicking the link “View this item” brings up the Business Catalyst “Administration Login”. Each of the brick and mortar stores has a login and password which is shared by the employees at that store (02).

6. After entering login information, the Order Details for the order are brought up (03).

7. The location the item is assigned to is checked again under the “Products” section in the “Description” column (04). The order can be “shipping” or “pick up at store” and one of the brick and mortar stores listed.

8. In the bottom left corner there is a blue “edit” button which is clicked (05).

9. The employee checks the bottom of the page where the items are listed to evaluate how

this order can be fulfilled (06).

   a. Some items are not carried in each store and are only stocked in one location. For example, there were “Marshmallow Tshirts” which are only in Lisle, or a “Cookie Classic” item which was only in Vernon Hills. The employee handling the order must know the stock thoroughly in order to be able to tell at a glance if any of the items are not carried in their physical store as Business Catalyst does not have access to this information.
   b. Some items are “online only”, meaning they are not available for pickup and must be shipped. The web site currently has no standard way to indicate if an item is “online only”. There is nothing to stop them from adding an “online only” item to their shopping cart and checking out with a “pick up in store” shipping option. Jen has estimated that least once a week, a customer needs to be contacted about ordering “online only” items for pickup.
      i. As of now (9/3/13), the Chicago store processes all “online only” orders, so any order with these items gets assigned to the Chicago location.
      ii. If the customer had selected “pick up”, they are emailed with a shipping quote to confirm that it’s alright to mail the items. The customer may choose instead to cancel the item rather than pay the additional shipping cost.

10. The order workflow will be assigned to the Chicago Shop if:
    a. “online only” items ordered
    b. “pick up in store” in Chicago
    c. international order
    d. “shipping” chosen and Chicago shop is believed to have most or all of the items in stock), the workflow is assigned to the Chicago Shop.

11. To assign the workflow to Chicago Shop:
    a. in Business Catalyst on the Order Details edit page, change the “Assign To” dropdown from “Not Assigned” to “Chicago Shop” (07). This dropdown is long and contains many selections which are unrelated to the stores due to other internal processes also using Business Catalyst, such as Donations and some Membership entities.
    b. At the bottom of the screen on the far left is a “Save” button to officially assign the order (08). The blue “Save and Finish” button, which is second from the left, would be the incorrect button to press, despite it being the most prominent button and directly next to the desired button, since it would remove the order out of the workflow and the visibility of the store clerks and place it in an archive of closed orders. Next to these are “delete” and “cancel” buttons, but these are not used and have unknown functionality.

12. The order workflow will be assigned to another store if:
    a. the order is for pickup at a non-Chicago location and it did not raise any of the

warning flags above

b. an order is known to have many items not in stock in Chicago and it's likely other stores have all of the items
c. if the order is known to require several inter-store transfers and the Chicago store is busy

13. To assign the workflow to another store, the steps are the same as #11 a and b except choosing the appropriate store in the drop down in place of "Chicago Shop". Once the order is reassigned, it leaves the workflow of the Chicago Shop. The other store will automatically receive an email about the workflow change with a link to the order.
    a. In addition, if the customer elected to pay online with a credit card, the associate must go into their email inbox to find the second email with the payment information Business Catalyst sent after the order was placed. Business Catalyst will not forward this email automatically and it must be done manually. This email is forwarded to the appropriate store. If the customer did not pay online, in order to avoid possible confusion, the associate will send an email indicating that there is no payment information.

14. While processing the other online order emails still in the inbox, the associate will keep open tabs along the top of the browser for orders assigned to Chicago Shop.

15. Once all of the emails are read, the order emails for the orders assigned to the Chicago Shop will be printed out and placed in the "incoming" file shelf under the desk to be processed further during a free period (80). The payment information will be printed at the same time. These orders will usually be kept open in the computer in the tabs since it is likely they will begin to be processed that day, and it is cumbersome to search for an order.

16. Printing payment information:
    a. If the order has a payment method attached to it, on the order print out, a partially obscured credit card number is listed (67).

    b. Pulling up the order's BC Order Details page (hopefully already open in a tab), scrolling down the page are a series of expandable menus. Select "Offline Payment" to display the payment information (09).

    c. If someone paid online with a credit card, next to PDF secure passphrase is a link with the word "show" (10).

    d. The "Offline Payment Authentication" overlay pops up requiring a password to be submitted. The username and password are the same as the ones to log into the admin interface. (11)

e. On the Order Details page, where the show link was is now a text box with a alpha-numeric random character string, which is copied to the clipboard. (12)

f. Opening up Outlook again, the payment information email (the second sent at the beginning) is opened, containing a link to a PDF file. (13)

g. Following the link opens Adobe Reader with a dialogue box requesting a password. (14) Paste in the passphrase copied from Business Catalyst and submit.

h. The PDF shows the customer’s name, the credit card number, the expiration date, and the amount of the charge. (15) This page is printed and attached to the printed order.

17. To search for an order in BC:
    a. If you have the order number, on the left side of the page, there is a “Search” option. (47)
        i. The order is found using the order number on the order print out (48).
    b. If a customer calls or emails and doesn’t know their order number, they must be searched by name
        i. in BC on the left side navigation under CRM is a “search” link - the customer is searched for by the name on the ITO (83).
        ii. The customer’s BC profile is displayed. Fourth from the top under the name is the link for “orders” (84)
        iii. on the customer orders page is a list of orders. Find the one waiting for the transfer and on that order line, the rightmost column is “Actions” with the word “view” in the order row. Click “view” to see the “Order Details” page (85).

18. After the orders are printed, the associate will go through the printed orders and if they have an item that requires a size, color selection, numeral selection, or other option, they have to check in the system. The item sizes and the numerals do not come on the workflow emails and are only available in the BC order details page.
    a. Open the item in BC
    b. In the “Description” section of “Products”, check for items with a size or for items that request troop “numerals” (90).
    c. The sizes and numbers are then written on the order print out (79).
    d. The item details are available on printouts made through BC and not email, but they are poorly aligned if item descriptions are long, forcing the associate to sit with a ruler to attempt to line up items to options as well as quantities to avoid mistakes (91). In general, it is easier to use the emails and look up the details individually than rely on these error prone BC packing slips. The packing slip is

the only option for items which are transferred, as they do not get the original workflow email with the detail-less orders (92). These BC printouts also must be used if BC is down or malfunctioning, which was the case the day before my interviews on 9/5/13.

Processing an Order

19. When processing an order, the printout is checked again for delivery method. On the second page of the order next to the total, the shipping will be listed as “$0.00” and it will say “Pick up at store” and the name of the store.
    a. If it is pick up, that line is highlighted (68) and on the front of the order in the upper right corner, “PU” is written to indicate that this order is for pick up (69).

20. The order is now scrutinized in more detail.
    a. The online store has no access to the inventory and therefore does not set limits on purchasing out of stock or limited stock items. Each store also carries its own separate inventory, meaning that any individual store may not have all items in stock for one order. The store associate generally has a fairly good grasp on their store’s current inventory and may be immediately aware that some items in an order are out of stock when first processing an order.
    b. There are also many “council specific” items which bear the GSGCNWI logo. Because the store ships nationwide, council specific items can be confusing. My research has shown customers are unable to differentiate between the nationwide store and the GSGCNWI store, and mistakenly order council specific items, for example, the “girl scout identification set.” There are also many shirts and hats or cookie merchandise which have the GCGCNWI logo. These customers then have to be contacted individually to confirm that these items are desired, so these orders have to be set aside, placing an extra burden on the store associate. The store owner will wait 3 business days for a reply, and then fill it as it was placed. Since phone numbers are not required, this often means relying on emails. It also places the entire order at risk for being cancelled if the person would rather go to their local store. If the store is very busy, there may not be sufficient time to contact a customer to confirm the items and they are simply mailed out. Aside from extra desk work, this also risks customer dissatisfaction when they receive items that have a different council’s name.

21. In the case when the employee’s store does not carry one or more items in the order OR the store is out of stock of one of the items OR the current stock is not large enough to fill an order
    a. the items are highlighted on the order print out (73).
    b. The employee must then do two things: a) attempt to locate the missing items at

other stores and b) contact the customer about the progress of their order.

22. As mentioned previously, the online store, and by extension Business Catalyst, does not have access to inventory. In order to access the inventory of each store, the associate opens RMS. Each store has a different login, but they all share a password, so that if a shop associate is at a different store, they can log in with that password.
    a. In the browser history or bookmarks is a link to “administration login” which will open RMS (81).
    b. There is also an icon on the desktop named “Store Operations POS” which will open RMS (97).
    c. If RMS is open and minimized, there is an icon at the bottom of the screen to open it (98).
    d. RMS is logged out when not in use (press F9 to log out), so the associate is constantly logging in and out of the system. I noted the associate would log in and out frequently during the interviews.

23. Locate missing items - each item highlighted on the order printout is searched for in RMS
    a. F2 to search item (92).
    b. search by description:
        i. The description in HQ is often unlikely to match the description in BC since they are generally entered by different people at different times.
        ii. Items that have words on them will generally be named after those. For example, there is a an order for a patch described as “Animal Shelter”. Pulling up a search in HQ and typing in “Animal Shelter” (28) returns many results as there is more than one “Animal Shelter” patch. Scanning through the results, Jen determines that “Animal Shelter Purple” is probably the most likely candidate. The item number that is returned is checked against the printed order form
    c. search by ID:
        i. Each item has several potential item IDs. I have on multiple occasions had associates sit with me patiently and attempt to explain how the IDs are determined on a per item basis, why they are potentially different in the inventory listing (RMS), the online store (BC), partial barcodes, and possibly GSUSA, but the process is complex enough to warrant its own investigation. To summarize:
        ii. through sheer moxie (and possibly a few cheat sheets hidden under the desk(99)), the associate identifies the desired item’s RMS ID and enters it into the search dialogue from step a).
        iii. once the item is located, double check that the “in stock” for this store is 0 in the “My available quantity column” in the search box (75)

24. Click the “Check Stores” button in the bottom left (76).

25. A list of the stores comes up with the quantity they have “on hand” (77).
    a. Each store that has this item is noted on the printed invoice by initials and how many they have in stock (74).

26. After each missing item has been looked up, the associate goes through the list and selects the stores that have in stock the largest number of missing items. Best case scenario is when one store has all of the missing items, but if the required number of items is split between several stores, the ones that will have transfer requests sent are circled (74).

27. The employee must decide one of the following:
    a. To forward the work order for another store to fill in its entirety. This is generally chosen when most of the items are carried in a single other store, or if the Chicago store is experiencing a busy period.. If this is chosen, the workflow is reassigned to the selected store using the steps listed earlier in this document.
    b. To request the missing items be transferred to the Chicago store for the order via an ITO (Item Transfer Order). If the customer lives out of the country or in another area that is expensive to ship to (most orders are shipped using UPS), instead of sending multiple orders from separate stores, the items will be transferred to the store with the most items for fulfillment in one shipment.
    c. If the items should be shipped in two separate shipments to the customer. This is generally chosen if the items are small and there will not be any employees traveling between the stores who could move merchandise. This will also necessitate an ITO.

28. The circled stores are emailed to confirm that they have these items in stock. Since there is no concept in RMS of “live” stock, some of those items may already be sold and are waiting for pickup or shipment, so the stock must be double checked by a human before sending a transfer request. An email is sent to the individual employees of the remote store.
    a. As in several places, the process here is slightly different between Mary Therese S. and Jen P.
    b. Mary Therese S.
        i. CC’d to Jen. P (Chicago store manager)
        ii. title is “Online Order [customer name]” so the email can be easily referenced through a search in the future.
        iii. The email includes the Business Catalyst ID number, given on the online order print out, and hopefully also the RMS ID. The ITO will only include the RMS ID, but since the ID numbers, item name, and item descriptions are often different between BC and RMS, both are provided for clarity. It can also be difficult to ensure the correct item is being sent due to ambiguous descriptions, so the BC ID which corresponds to the order can

be used to look up a photo of the item.

c. Jen P.
   i. email is titled “Item Needed”
   ii. email includes the BC ID and a brief description taken from the order printout (100).
   iii. Jen goes on to explain that the store associate should theoretically know the automatic process to convert BC ID numbers into RMS ID numbers. For the item shown in (100) which has a BC ID of 12161, this is a GSM ID because it is not prefaced by letters (such as STK or ITT for “stickers”), and did not begin with 99 (which are “Advantage Patches), or have any of the other numerous indicators of how the translation process would be done. The associate is expected to have internalized this process to be able to translate the number for the ITO.
d. While waiting to hear back from the stores about the items requested, the papers are clipped together and stored under the desk. They will be processed later in the day to ship the order’s items the Chicago Store does have in stock.
e. If a store does not have one of the items in live inventory, they will email the Chicago Shop back, and the associate will email the next likely candidate noted on the order print out until the items are located. If the items cannot be located, the customer will be emailed to ask if they want to cancel or wait until the item is restocked.
f. if only some of the requested amount for a particular item can be found, say if someone ordered 10 of a patch and the associate can only find 6, they will email the customer to confirm that they still want 6, or if they want to cancel the item entirely. Since many people are ordering for whole troops, not having enough patches for each girl can mean they’d rather not order them at all then only be able to give them to some girls. The associate can also offer to order more of the item, but it will require extra shipping time and likely will be split into two shipments.
g. some customers need the items immediately and are willing to drive to any store that can fulfill the order, so this must be taken into account when looking for a place to fulfill the order. The order would then be transferred in full to that store. This is more common during bridging or other major events. This could be indicated in the “comments” section on the form, or in communication with the customer.

29. In any case where a customer must be contacted:
    a. if a customer supplied a phone number during the online checkout process, the employee can attempt to contact them at this number. This is currently not a required field, and is often left out. If supplied, this number is provided on the order printout.
    b. the next step would be to check and see if the customer has already made a purchase in the past, so their record is pulled up in BC and checked if a phone

number exists there (mentioned by Mary Therese S.)

c. otherwise, the customer must provide an email at checkout, and they can be contacted this way. This email is provided on the order printout.
d. If the email address is a recognizable inter-council address, the associate can try to look up the individual in Personify (the membership database) if they have access to it.

30. However the customer is contacted, it will be noted on the print out sheet with time and the results of the conversation. Any emails sent to or received from the customer will be printed and attached to the order.
    a. In one instance, a customer ordered discontinued items and had selected “pick up”. She was emailed and informed that the items were for shipping only and would be an additional $12 The customer replied to say that this would be acceptable. A note was written at the bottom of the order print out (45).
    b. This customer also had ordered 6 “Making Music” patches but the Chicago Store only had 4 in stock. The customer emailed again to say it was ok to cancel that item from the order. This email was printed and the conversation also noted in writing on the order print out. The item was crossed out and had “cancelled” written next to it (46).
    c. These changes will NOT be propagated back up to the BC orders database, but they will be reflected in the RMS order. The discrepancy would be difficult to capture and makes reporting on online sales difficult since it is very common for orders to change after they have been placed due to various reasons.

31. It is not uncommon for parents who are purchasing troop numerals to not know or be unsure of their daughter’s troop number. The shop associate can then pull up the daughter’s record in Personify, the council membership database, to obtain this information. However, Personify only contains information about members in the GSGCWI council. Since the web site serves the whole country, this information is not available for many online customers.
    a. At the moment, only Mary Therese S. has access to Personify, so if another associate handles the order, they would not be able to look up the troop number this way.
    b. Without Personify access, if the parent knows the name of the troop leader, looking the leader up in RMS (F7 to search for a customer) can sometimes yield the number (101). Sometimes the associate entering the customer into the system, if they know the individual is a leader, will put the troop in the customer’s name or “business,” but not always. If this does not yield the number, the parent will have to cancel the numeral patches from the order and buy them later, or take their chances with the numbers they guessed.

32. When a store receives the email from the Chicago Shop asking about the items, they will email back confirming they have the items and will ship them out.

a. On the order print out, the initials of the store that is transferring the item are written next to the highlighted item in question and circled (43).
b. The name and date of contact of the store that is sending the items is noted on the bottom of the page (44)
c. The papers are clipped together and stored under the desk again until the remote store sends an email copy of their Transfer Out ITO, indicating that they have shipped the requested items.

Inventory Transfer Orders (ITOs)

The ITO emails are printed throughout the day and placed in the "To Do" file shelf. When there is free time, they are taken out and sorted through.

ITOs are cumbersome to complete and fairly similar between types. A "Transfer Out" request has been fully documented where another store has sent an ITO to ship some items to a customer. The other types of ITOs and their differences are noted, but do not go as in depth.

Transfer Out ITO (remote store requests items shipped to a customer or another store)

33. With the Transfer Out ITO request in hand, print out the customer's (or store's) address label & gather the items (covered in the Shipping section) (111)

34. From the Windows start menu, open "Store Operations Manager" (86)

35. Select "Transfer Inventory Out" (103).

36. In the right hand side, select the "new" button (104).

37. A new transfer request pops up (105). The Chicago Shop's address is prepopulated in the "Transfer From" section.

38. In the "Ship To" text box, type the name of the store it is going to.

39. Underneath the shop name, if the items are being shipped to a customer, paste in the customer's name and address (106).

40. In the next row of text boxes, on the far left is a field labelled "Requisitioner" where the store associate keying in the ITO types their name (107).

41. Three fields to the right of that is a “Ship via” field, type in “MAIL” (108).

42. One row below that on the right side is a box labelled “Remarks”, type “CUSTOMER ORDER”.

43. At the top, there are two tabs, “Header”, and “Contents”. Click “Contents” (109).

44. There is a button titled “Quick Scan” near the bottom (110). Clicking “Quick Scan” will open a popup (111).
    a. If the item has a bar code, scanning an item normally at the cash register will cause it to appear on the list of “Contents” in the background (112).
    b. If the item does not have a bar code, the item must be looked up in RMS to find the ID number as outlined previously in this document (138). This ID number once found is manually entered into the QuickScan popup as well as the quantity sent. Pressing “Accept” will add the item(s) to the list of “Contents.”

45. After entering all items, click “Done” inside the “Quick Scan” popup.

46. If an item does not have a bar code

47. Now on the list of “Contents”, clicking on the “QTY Ord” column for an item will allow the associate to set how many of an item are being sent (113).

48. Once all items are properly entered, click “OK” in the bottom right (114).

49. A popup will appear saying that the APO number will be automatically generated. Click “No” (115).
    a. Jen P. : “We don’t do “generate APO number” anymore since the same number I create here can also be created in Vernon Hills, or Homewood, etc. So what we’ve decided to do [for “order number”] is put the date and the store initials that it is going to.”

50. In the upper left under “Number”, type MMDDYY[store initials] (116)

51. In the bottom right, click “OK”.

52. The ITO will be listed and highlighted in blue. (117).

53. On the left hand side is a button labelled “Edit.” Click this to reopen the ITO (118).

54. We want to send an email copy to the requesting store. With the ITO once again opened, click the bottom left button labelled “Export Document” (119).

55. In the “Export” popup, click “OK” (120).

56. An email will open with a copy of the ITO (121). The email is addressed to each individual who works at the store and cc’d to anyone else working at the Chicago Shop (in this case, Mary Therese S., so she is aware of the transfer).

57. Send the email, and a popup displays a confirmation message. Hit “OK” on the popup (122).

58. Once again on the ITO order, click “OK’ in the bottom right (123).

59. On the page with the highlighted ITO again, along the buttons on the right side, the bottom (4th) is named “Issue”, click that (124).

60. On the new screen which pops up, the order’s “Contents” are displayed again. A button on the bottom right labelled “Issue All” is clicked (125). This will change the color of the order’s “Contents” from green to blue.

61. Directly next to the “Issue All” button is “Commit”, click this (126).

62. A popup will confirm that the inventory database will be updated to reflect this transfer. Click “Yes” (127).

63. The screen will turn grey. Click “OK” in the bottom right corner (128).

64. The items are now packaged, labeled, and placed with the other items ready for shipment.

Transfer In ITO (remote store has transferred items to the Chicago Shop)

65. If the items are being shipped to the Chicago Office, the “ship to” will display the store’s name (130). The ITO email was likely received in advance of the shipped items arriving and placed in the “waiting” file shelf under the desk until the package arrived.

66. With the Transfer In ITO (and the received merchandise) in hand, the process begins. The patches in this photo are retired stock being transferred to the Chicago Shop since they are mostly in charge of retired items (130).

67. When sending stock between stores, the associates will write the ITO number on the outside of the package (131).

68. On the ITO, place an “Entered” stamp in the top area to indicate that it is being entered into the computer (132).

69. Open Store Manager, select “Inventory Transfer In” (133).

70. In the right hand side, select the “new” button (134).

71. In the popup “Create Inventory Transfer In Orders”, select the top radio button labelled “Create a new blank inventory transfer” (135).

72. Click the “OK” button along the bottom (136).

73. In the screen which pops up, using the printout of the ITO, enter the name of the sending store in all caps. Next to the name of the store, enter the ITO number of the printout (137).

74. In the next row of text boxes, on the far left is a field labelled “Requisitioner” where the store associate keying in the ITO types their name (107).

75. Three fields to the right of that is a “Ship via” field. Since these items were not shipped but were delivered by hand, “STAFF” is entered (108).

76. Three fields to the right of that is a “Ship via” field, type in “MAIL” (108).

77. One row below that on the right side is a box labeled “Remarks”, type “CUSTOMER ORDER”.

78. Click “Contents” tab and enter the items like in the previous ITO (111).

79. Once all items are properly entered, click “OK” in the bottom right (114).

80. A popup will appear saying that the APO number will be automatically generated. This time click “Yes” (115).

81. In the bottom right, click “OK”.

82. On the page with the highlighted ITO, along the buttons on the right side, the bottom (4th) is named “Issue”, click that (124).

83. On the new screen which pops up, the order’s “Contents” are displayed again. A button on the bottom right labeled “Issue All” is clicked (125). This will change the color of the order’s “Contents” from green to blue.

84. Directly next to the “Issue All” button is “Commit”, click this (126).

85. A popup will confirm that the inventory database will be updated to reflect this transfer. Click “Yes” (127).

86. The screen will turn gray. Click “OK” in the bottom right corner (128). The highlighted item should disappear, and now the merchandise is moved into the inventory in the back of the store.

Transfer In ITO fulfillment - When another store has shipped a partial order directly to the customer:

87. If the items were sent directly to the customer in a separate shipment, The ITO will have the customer’s information in the “ship to” section (82).

88. Mary Therese S. - In order to document the receipt of the ITO -
    a. in BC on the left side navigation under CRM is a “search” link - the customer is searched for by the name on the ITO (83).
    b. The customer’s BC profile is displayed. Fourth from the top under the name is the link for “orders” (84)
    c. on the customer orders page is a list of orders. Find the one waiting for the transfer and on that order line, the rightmost column is “Actions” with the word “view” in the order row. Click “view” (85).
    d. Under “Order Details” in the “Details” section after the notes about the original Chicago shipment, “ITO [ITO number]” is added.
    e. If the order is not waiting on any additional items, click again the blue “edit” button in the bottom left corner (50).
    f. In the “status” dropdown, change to “order fulfilled” (51)
    g. Now that the order is complete and ready to be closed, click the “save and finish” blue button at the bottom of the page (53)

89. Jen P. - At the end of the day, the ITOs are gathered with the “waiting” orders and paired up. The orders are then processed as with the others in the “End of Day Processing” section.

Hybrid ITO - when several types of transfers are requested on the same order form.

90. While technically each transfer to or from a store should have its own ITO, it is time consuming and inconvenient to do one per transfer when you have several requests going to the same store, so it is not unusual to see several combined into one. In this photo, a store is sending old stock to Chicago and also confirming that a partial order was mailed out to a customer from them by request of Chicago the day before (132).

91. When filling out the “Ship via” field on the ITO, since in this example the ITO in items were delivered by hand, but since some items have already been shipped to a customer, “STAFF/MAIL” is entered.

92. Similarly, when filling out the “Remarks” section, “CUSTOMER ODER/STOCK” is entered.

Readying the Order for Shipment

93. Once it is determined that all items are in stock, or the transfers from other stores have been received, the items are gathered up from the inventory in the back and placed with the printed order in the front.

94. Back at the computer, open RMS (18).

95. Hit F7 and search for the customer. Last name is most common, but a search can also be done by phone number. However, since phone numbers are not often provided during online checkout, name is generally replied upon (19).

96. If the customer is in the system, select them and click “ok”. If the name is common, the associate must individually click on each entry and check against the address to make sure it is the same person (20).
    a. If the customer has bought from the brick and mortar stores in the past but did not have an address attached to their record at the time, the associate must create a new customer, as store managers and associates do not have access to editing customer’s data.
    b. If the address or any of the key information in RMS is different from the addresses in the order, the customer is contacted to confirm the address change. If there has been an address change, the information should be updated. However, the associates do not have access to this. The customers used to be entered into a spreadsheet for someone with access to update the entries, but this no longer happens. Instead, a new customer is created with the updated information.

97. If the customer is not in the system, or can’t be found within 15-20 seconds with 100% certainty, a new customer is created. Click on “new”
    a. enter in the new customer’s information, given on the order print out (21)
    b. click “OK”
    c. given a confirmation popup, click “OK” again (22)
    d. no fields are required for creating a customer. They can be created with blank

details, just a name, or the complete information. Because nothing is required, the quality of data entered varies dramatically.

98. After selecting the customer, a new “sale” is automatically created.

99. Each item must now be entered into the system. If the item has a bar code, it can be scanned (24).

100. Compare the “Item Lookup Code” (25) that is entered into the system against the item number given on the order print out (26) and the UPC number (27) - the last four digits of all should match. I once again defer to the expertise of the people who were kind enough to sit with me if I have gotten this wrong. The descriptions will be unlikely to match and can’t be depended on to ascertain if the right item was found, so the IDs must be checked.
    a. Some item numbers come directly from GSUSA.
    b. For items that are unique to the council, there is a “house” bar code which begins with 7 and is four to five digits long. This item number is set in a spreadsheet. Each new item is entered sequentially into the spreadsheet which determines its barcode. The item’s name is then set by the person entering the item who names the item descriptively and attempts to make the item names unique and memorable. For example, there is a stuffed cow with a pink tshirt on it that is named “Peace Love Cow”
    c. When new items without barcodes are added by other stores than the Chicago one, an email is sent out to all stores with a blurb about the new item so that other shop employees will be able to locate and recognize the new items.

101. If the item does not have a bar code (for example, many patches), a search is done based on a description of the item (see step 21).

102. Once the item is confirmed to be correct and has the proper amount entered into the system, the item is circled in pen on the order print out (28).

103. While I was doing interviews, there was a “sale” on scrapbooks - buy 3 sets of stickers and get the scrapbook for $10 (normally $30). As there is no way to program this into the system, it must be done manually.
    a. First, the associate must know about the sale
    b. The associate must also notice the order has all of the items required for the sale
    c. On the order in RMS, move the cursor onto the price of the item (93).
    d. Type in the new price and hit enter (94).
    e. The new price will appear with a red lightning bolt (95). The order can finish being processed normally.

104. After all items are added to the order

   a. If the order is going to be shipped, an item for “shipping” is added for the amount listed as “shipping” on the order print out.
   b. if the order is for pick up, next to the total on the order print out is written “completed/not paid”.

105. The order total in RMS (31) is double checked against the total in the order print out (32).

106. If the total does not match, the order must be gone over again to determine the discrepancy and fixed.

107. If the order is an online order, there is a $0.00 item called “ONLINE CUSTOMER” added. This is best practice, but when searching through the database tables showed it is a step that is occasionally missed, especially in the case of a customer who is picking up but placed the order online (33).

108. If the order is for “pick up”, it is set aside in the section reserved for on hold orders until the customer arrives. (customer knows it is ready for pickup after 12 the next day)
   a. Cnce the customer comes to pick up their items, if there was payment information entered for the order, the customer can take the order without additional steps, otherwise they have to check out before receiving the items.
   b. Next to the “PU” in the corner on the order print out, the employee writes the date of the pickup and their initials. This order is then put in the daily filing shelf in the “completed” section (70).

109. For items to be shipped: on a second computer with a label maker attached, the customer’s address on the printed order (or from the ITO) has a label created and paper clipped to the order. (16)
   a. under the address on the label is a code. For example, 330 means “online order being shipped out from Chicago”, and 331 means “transfer from a different store” either to a customer or two a store.

Processing Payment

110. For online orders, now that the order is processed and ready for shipping, the payment dialog is opened (F12) (34)

111. The payment details for the individual which are attached to the order are entered and submitted (35).

112. The credit card is processed. If successful, a receipt will print (36).
   a. if there is an error, a “declined” or other error message will appear. One of the

more common errors is “ARC wrong”, which generally means it was a prepaid debit card with insufficient funds.

b. The customer will be called or emailed at this point asking what they would like to do. Calling is the preferred method, but since phone number is not required when checking out online and often omitted, emailing is usually the next step.
c. A note is written under the order of how the customer was contacted. If there was no response yet, it is filed in the “waiting” section in the shelf under the desk and in BC, the status is changed to “On Hold”. If the customer was emailed, a printed copy of all emails to and from the customer are attached to the order.
d. If the customer is able to be contacted via the phone, the results of the exchange are written on the order printout, dated, and initialed.
e. The order is set aside until there is a reply, or processed when the issue is resolved.

113. The employee writes “online” in the signature portion of the receipt of the store copy (37).
    a. On the customer’s copy, Jen writes “Thank you :)” (38).

114. At the top of the first page of the order print out, an “entered” stamp is placed (39).

Shipping Items

115. In the center of the first page of the order print out, a “shipped” stamp is placed (40).
    a. If the order is “complete”: all of the items are present for an order and are getting shipped together, the “complete” checkbox is marked in the “shipped” stamp (41).
    b. If one or more items are missing and being shipped from another store, the “partial” checkbox is selected.
    c. The “UPS” or “US Mail” boxes are selected depending on the shipping method. The store employee knows through years of experience how the item will be shipped.
    d. The “shipped” stamp is then dated and initialed by the person completing the order.

116. The items are packaged for shipping.
    a. If an envelope, the address label is placed so that the flap is on the opposite side of where the mail code will be placed to minimize chances of the package getting stuck in the mail processing machine (129).
    b. The receipt is placed on top of the items in the package and the envelope is taped shut. (42)

117. Items ready for shipping are then piled in the back of the room. They will be moved

to the shipping room in the back when all of the orders are processed or the pile gets unwieldy.

118. The printed order is then filed under the desk with the other "processed" orders for the day (43)

End of Day Processing

119. At the end of the day, the "processed" pile is taken out and gone through one by one. Business Catalyst is pulled up. On the left side of the page, there is a "Search" option. (47)

120. The order is found using the order number on the order print out (48).

121. The customer's name and the order was placed pops up, click on it (49).

122. Once the order is pulled up again, click again the blue "edit" button in the bottom left corner (50).

123. Change order status:
    a. If the order is complete and not waiting on any ITOs, in the "status" dropdown, change to "Order Fulfilled" (51)
    b. If the order is waiting on ITOs, change the status to "Partially Fulfilled"

124. In the "detail" box,
    a. all of the written notes about an order are transferred over, including canceled items (52). The physical copies of the orders are only saved for 60 days after the order, so this becomes the only record of the transaction.
    b. Also in the notes box, enter the method of shipping, the date, the store's initials, and the initials of the person who completed the order.
    c. If the items shipped are only part of the order and the rest are being shipped from another store, also write "ITO [ITO number]"

125. If the order has a status of "Order Fulfilled" and is not waiting on ITOs, click the "save and finish" blue button at the bottom of the page (53).
    a. If the order is still waiting on transfers, click "Save" in the bottom left.

126. A small black popup appears in the upper right with a "success" message (54).

127. On the order print out, in the "entered" stamp, the date is written and initials of the person are written(55).

128. The order papers are filed for 60 days in the office if “Order Fulfilled” (56). “Partially Fulfilled” orders are placed into the “waiting” section of the file stack and will be checked daily until they are processed.

129. Once a month the shop manager (or just Jen? or every shop manager or senior associate?):
    a. Business Catalyst and under reports in the menu on the left, select “e-commerce” (57).
        i. track top products in a separate spreadsheet? From the data in BC? Tracking anything else? (58)
    b. To find out which stores still have outstanding orders
        i. select CRM in the left menu and go to “Orders” (59).
        ii. In the top menu, choose “Filters” (60)
        iii. in the drop down for “assigned to”, select the store name and click the blue “apply filter” button (61)
        iv. The screen provided shows the outstanding orders for a particular store. In the bottom left, select “Export Report” and choose PDF (62).
        v. at the bottom of a screen, a popup will appear, select “open” (63).
        vi. Once the PDF is opened, in the top menu go to File > Send FIle (64).
        vii. A dialogue box will pop up, select “Continue” (65).
        viii. Outlook will open an email with the PDF attached. Jen writes an email to the store manager at that location and requests a review of the attached outstanding orders (66).

Out of Stock & Large Orders

Once an item is completely out of stock and discontinued, someone needs to remove the item from the online store. They have to contact Amanda Cervantes (who is in charge of online updates right now) and tell her to remove the item.

Generally orders are filled within 24 hours of placement, but larger orders pose a problem. A common situation is when a troop will order 15 of a certain type of shirt in various sizes. Since each store generally does not carry a large amount of stock for any one item, this can mean that the order may take a week to either gather up from the various stores, or have more ordered from the supplier. This is a lot of manual work for the employee to track down each shirt and it’s also an unusual delay for the customer, which must be clearly communicated to the customer.