



SOLUTIONS ARCHITECT

Managing Orders

Liferay
 **Commerce**

Managing Orders

Learning Objectives

- Understand the order management options available within Liferay Commerce
- Learn how to manage shipments across multiple warehouses

Tasks to Accomplish

- Create and process a new order
- Create and manage a shipment from the new order

Exercise Prerequisites

- Java JDK installed to run Liferay
 - Download here: <https://www.oracle.com/technetwork/java/javase/downloads/jdk11-downloads-5066655.html>
 - Instructions on installation here: https://www.java.com/en/download/help/download_options.xml
- Unzipped module exercise files in the following folder structure:
 - Windows: `C:\liferay`
 - Unix Systems: `[user-home]/liferay`
- A Liferay DXP or CE 7.2 instance up and running with Commerce 2.1 installed
- A site created using the Minium accelerator

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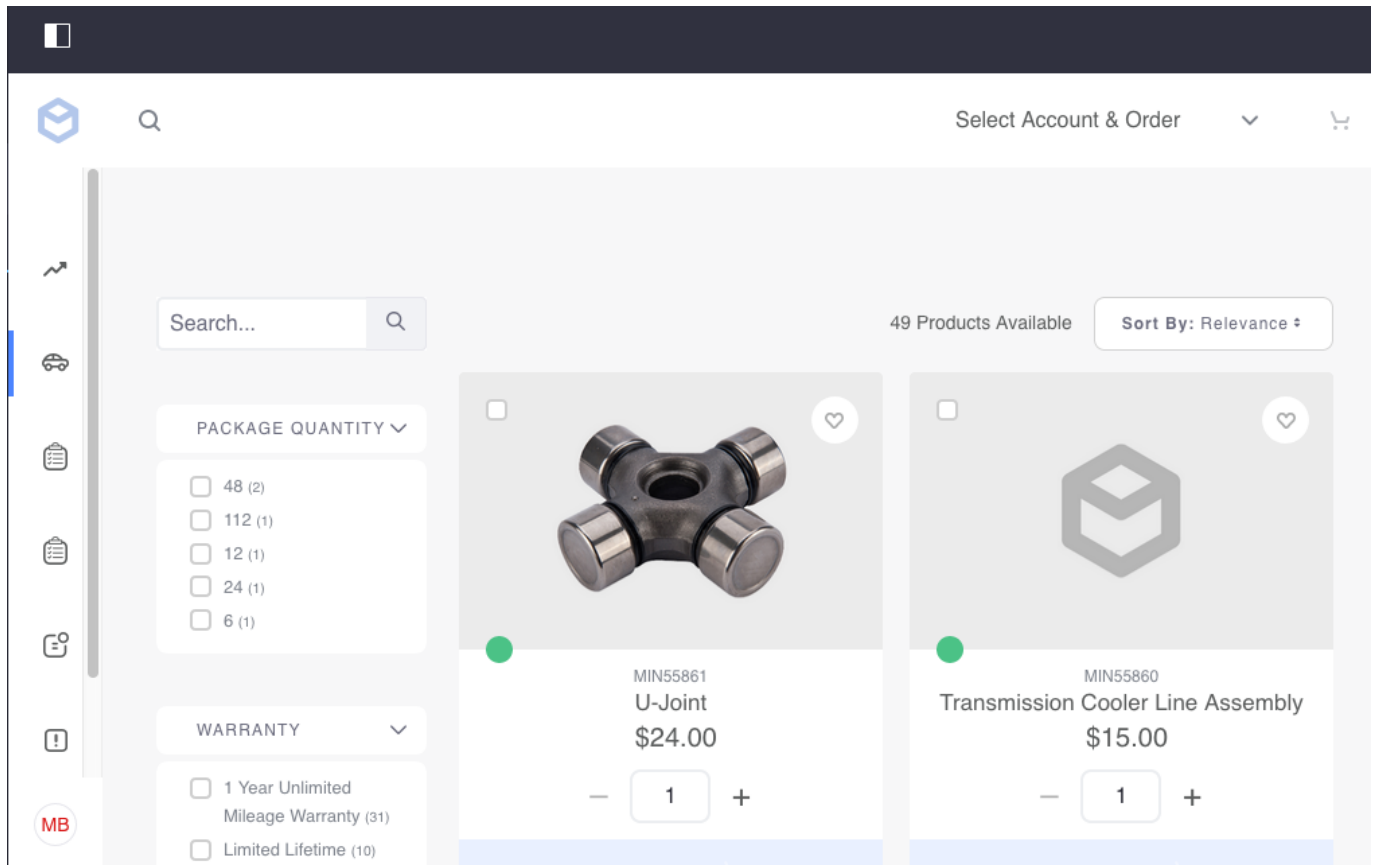
Create New User Accounts

Exercise Goals

- Checkout as a Buyer
- Progress the order as the Seller

Log In as Paul Hudson from Connolly Repair

1. **Sign in** to Liferay as Paul Hudson.
 - Make sure you go to *localhost:8080* in your browser once Liferay is started.
 - If you haven't created the User Paul Hudson, follow the steps in the Managing Accounts Module or import the CSV file in your exercise folder. Note that the video on Liferay University will use the User Mia Brewster and the Speedy Auto Services HQ Account for this exercise.
2. **Open** the *Menu*.
3. **Go to** the *Site Administration > Site Selector*.
4. **Click** the *My Sites* tab.
5. **Choose** *Minium Automotive*.
6. **Click** the *Catalog* Minium navigation menu.



Create an Order for Connolly Repair

1. **Type** Brake Rotors in the Search Bar.

- Note: The Liferay University video will use the PremPower Battery as the product for the order.

2. **Press** Enter to search.

3. **Click** on the *Brake Rotors*.

4. **Click** the *Add to Cart* button.

5. **Click** the cart icon in the right corner.

6. **Click** *View Details*.

Connolly Repair

TOTAL \$ 40.00

NOTES

ACCOUNT ID 40946 ORDER ID 41369 ORDER DATE Jun 19, 2020 1:33:09 AM

BILLING ADDRESS SHIPPING ADDRESS

Connolly Repair

Connolly Repair

Search

NAME	OPTIONS	SKU	PRICE	DISCOUNT	QUANTITY	TOTAL
Brake Rotors		MIN93020	\$ 40.00	\$ 0.00	1	\$ 40.00

DELETE

SUBTOTAL \$ 40.00
DELIVERY \$ 0.00
TAX \$ 0.00

TOTAL \$ 40.00

10 items Showing 1 to 1 of 1

SAVE CHECKOUT

Check Out the New Order

1. Click on the *Checkout* button.
2. Click the *Choose Shipping Address* drop-down.
3. Choose *Connolly Repair*.
4. Click *Continue*.
5. Choose *Standard Delivery* for your Shipping Method.
6. Click *Continue* after checking over the Order Summary.
7. Click *Go to Order Details*.

Connolly Repair

TOTAL \$ 55.00 NOTES

ACCOUNT ID 40946 ORDER ID 41369 ORDER DATE Jun 19, 2020 1:45:58 AM

BILLING ADDRESS SHIPPING ADDRESS

205 W Wacker Drive Chicago 60606 205 W Wacker Drive Chicago 60606

Search

NAME	OPTIONS	SKU	PRICE	DISCOUNT	QUANTITY	TOTAL	SHIPPED QUANTITY
Brake Rotors		MIN93020	\$ 40.00	\$ 0.00	1	\$ 40.00	0

10 items Showing 1 to 1 of 1

REORDER

SUBTOTAL \$ 40.00 DELIVERY \$ 15.00

Log In as Your Administrative User

1. **Go to** the *User Menu*.
2. **Click** *Sign Out*.
3. **Sign In** as the Platform Administrator.
 - This should be test@liferay.com unless you created a different Platform Admin when you first started your instance.

Accept the Order from Connolly Repair

1. **Go to** *Control Panel > Commerce > Orders*.
2. **Click** the top order.
 - This should be the Connolly Repair order we just filled out as Paul.
3. **Click** *Accept Order*.



Connolly Repair

ID: 41369
ERC: [Edit](#)

APPROVED

Cancel

Hold

Create Shipment

General

Payments

Shipments

Notes

Emails

Pending ✓

Processing

Shipped

Completed

Details

Billing Address

[Edit](#)

205 W Wacker Drive Chicago IL 60606

Purchase Order Number

[Add](#)

Click add to insert.

Order Date

6/19/20 1:45 AM

Printed Note

[Add](#)

Click add to insert.

Shipping Address

[Edit](#)

205 W Wacker Drive Chicago IL 60606

Channel

Minium Demo Portal

Requested Delivery Date

[Add](#)

Click add to insert.

Items

Search



SKU

Name

Options

Delivery Date

Delivery Group

Price

Discount

Quantity

Total



MIN93020

Brake Rotors

\$ 40.00

\$ 0.00

1

\$ 40.00



Bonus Exercises

1. Configure both an Approval and a Transmission workflow for an order of Timing Belts for Speedy Auto Services HQ. Complete the checkout process on the order and progress the order to awaiting shipment (Hint: You will need to login as multiple users to complete this exercise).

Deliver Shipments

Exercise Goals

- Create a Shipment from an Order
- Manage the Shipment and Delivery of the Products from the UI
- Confirm the order has been completed by checking statuses as the Seller

Create a Shipment

1. **Sign In** to your Liferay instance if you're not already signed in.
 - This should be on localhost:8080
 - Make sure you sign in as the Platform Admin
2. **Go to** *Control Panel > Commerce > Orders*.
3. **Click** the top order.
 - This should be the Connolly Repair order from the previous exercise.
4. **Click** the *Create Shipment* button at the top right.


Cancel

Hold

Create Shipment

Add Details to the Shipment

1. Click the add icon in the *Products* sections.
2. Check the box next to the SKU that shows up.
 - The only SKU that shows up should be the Brake Rotors that Connolly Repair ordered.
3. Click *Submit*.
4. Click the *Options* icon next to the product.
5. Choose *Edit*.
6. Type 1 for *Quantity in Shipment* next to the *United States - Southwest* warehouse.
7. Click *Save*.
8. Close the pop-up.
9. Click *Edit* next to *Estimated Shipping Date*.
10. Choose today's date.
11. Click *Submit*.
12. Click *Edit* next to *Estimated Delivery Date*.
13. Choose the date a week from today.
14. Click *Submit*.


Connolly Repair
ID: 41384
Finish Processing

Details

Carrier Details Edit Carrier Click edit to insert. Tracking Number Click edit to insert.	Shipping Address Connolly Repair 205 W Wacker Drive Chicago IL 60606 United States Channel Minium Demo Portal	Estimated Shipping Date Edit Jun 18, 2020 Estimated Delivery Date Edit Jun 25, 2020
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Products

+

SKU	Order Id	Warehouse	Outstanding Quantity	Quantity in Shipment	
MIN93020	41369	United States - Southwest	0	1	⋮

10 items
 Showing 1 to 1 of 1
 < 1 >

Update the Shipment Status from Processing to Delivered

1. Click the *Finish Processing* button in the top right corner.
2. Click the *Ship* button.
3. Click the *Deliver* button.



Connolly Repair ID: 41384 ⓘ

Processing ✓
Ready to Ship ✓
Shipped ✓
Delivered ✓

Details

Carrier Details Edit Carrier Click edit to insert. Tracking Number Click edit to insert.	Shipping Address Connolly Repair 205 W Wacker Drive Chicago IL 60606 United States Channel Minium Demo Portal	Estimated Shipping Date Edit Jun 18, 2020 Estimated Delivery Date Edit Jun 25, 2020
---	---	--

Products

SKU	Order Id	Warehouse	Shipped	
MIN93020	41369	United States - Southwest	1	Delete

Confirm the Order Status has Changed

1. Go to *Control Panel > Commerce > Orders*.
2. Click the *Completed* tab.
 - If the Connolly Repair order is not visible, ensure that you have correctly updated the shipment status to *Delivered*.

Orders

All

Open

Pending

Processing

Completed

Search

Order Id	Account	Account Number	Channel	Amount	Order Date	Order Status	Acceptance Workflow Status
41369	Connolly Repair	40946	Minium Demo Portal	\$ 55.00	Jun 19, 2020 1:45:58 AM	COMPLETED	APPROVED

20 items

Showing 1 to 1 of 1

1

Check on the Order as the Buyer

1. Go to the *User Menu*.
2. Click *Sign Out*.
3. Sign In to the platform as Paul Hudson.
4. Open the *Menu*.
5. Go to the *Site Administration > Site Selector*.
6. Click the *My Sites* tab.
7. Choose *Minium Automotive*.
8. Click *Placed Orders* in the Minium navigation menu.

The screenshot displays a web application interface. At the top, there is a header bar with a blue cube icon, a search icon, and a user profile section for 'Connolly Repair' with the message 'There is no order selected.' and a dropdown arrow. Below the header is a sidebar with various icons. The main content area features a search bar and a table of orders. The table has columns for ORDER ID, ORDER DATE, ACCOUNT, AUTHOR, STATUS, and AMOUNT. A single row is visible with the following data: ORDER ID 41369, ORDER DATE Jun 19, 2020, ACCOUNT Connolly Repair, AUTHOR Test Test, STATUS Completed, and AMOUNT \$ 55.00. A 'VIEW' button is located to the right of the row. Below the table, it says '10 items' and 'Showing 1 to 1 of 1'. A pagination control shows '1' in a box with arrows on either side.

ORDER ID	ORDER DATE	ACCOUNT	AUTHOR	STATUS	AMOUNT
41369	Jun 19, 2020	Connolly Repair	Test Test	Completed	\$ 55.00

Managing Orders Quiz

1. Which of the following is *not* a stage of the Order Lifecycle?
 - A. Order Transmitted
 - B. Order Created
 - C. Order Placed
 - D. Order Processed

2. In which tab of the *Orders* menu would one find items placed in a customer's cart?
 - A. Open
 - B. Pending
 - C. Processing
 - D. Incomplete

3. Approval and Transmission workflows are required when performing B2B transactions in Liferay Commerce.
 - A. True
 - B. False

4. Where does the first step of creating a shipment in Liferay Commerce take place?
 - A. *Shipments* menu
 - B. *Accounts* menu
 - C. *Checkout* menu
 - D. *Orders* menu

5. The inventory used in a single shipment can be sourced from multiple warehouses.
 - A. True
 - B. False

Answer Key

1. B
2. A
3. False
4. D
5. True