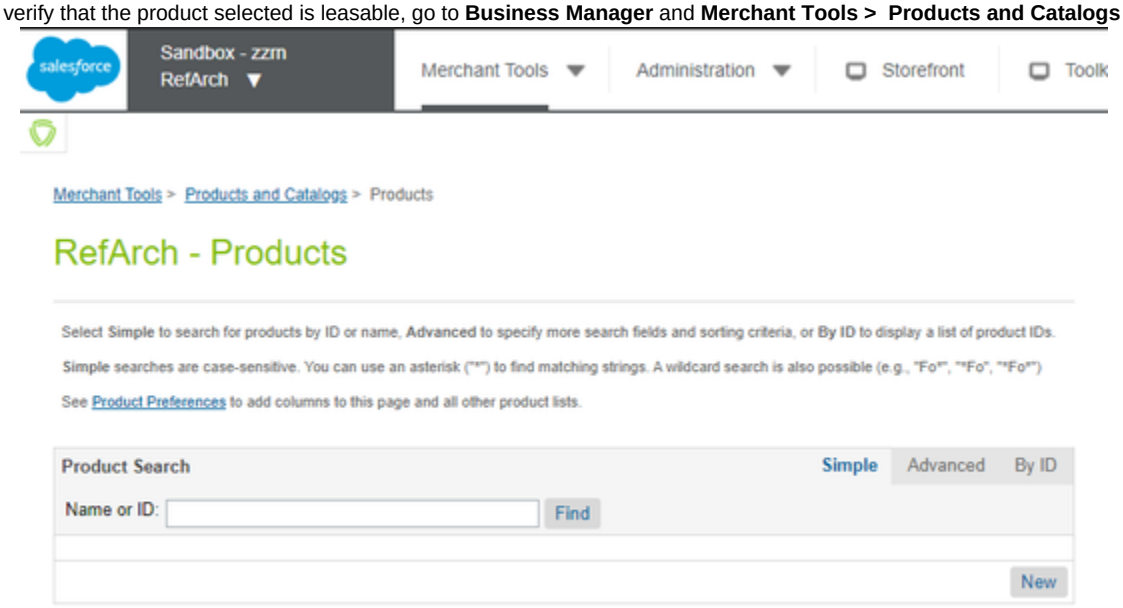
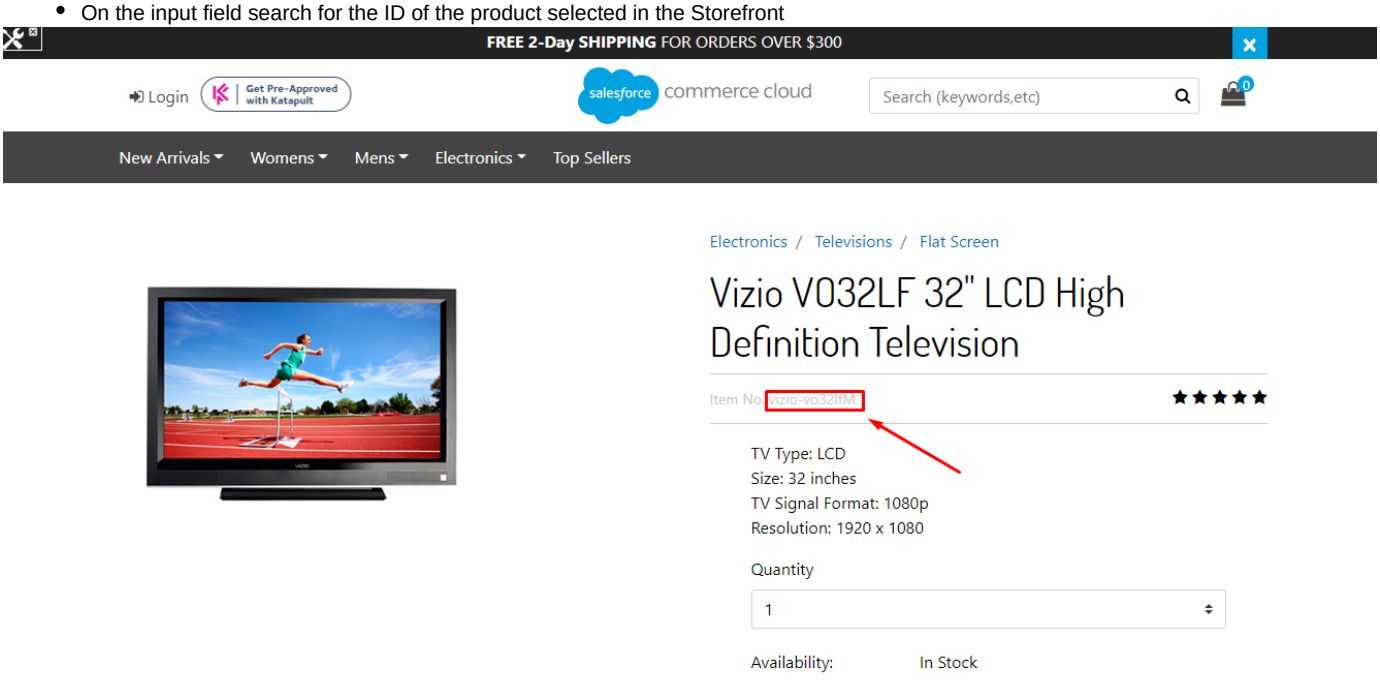
User Guide SFRA - Create, Place and Cancel an Order with Katapult

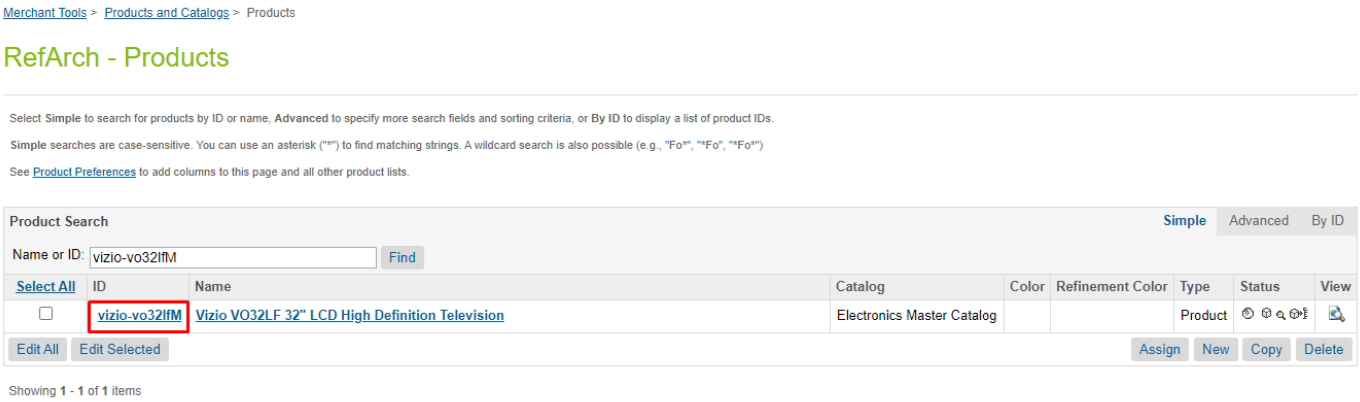
- First verify that the product selected is leasable, go to **Business Manager** and **Merchant Tools > Products and Catalogs > Products**



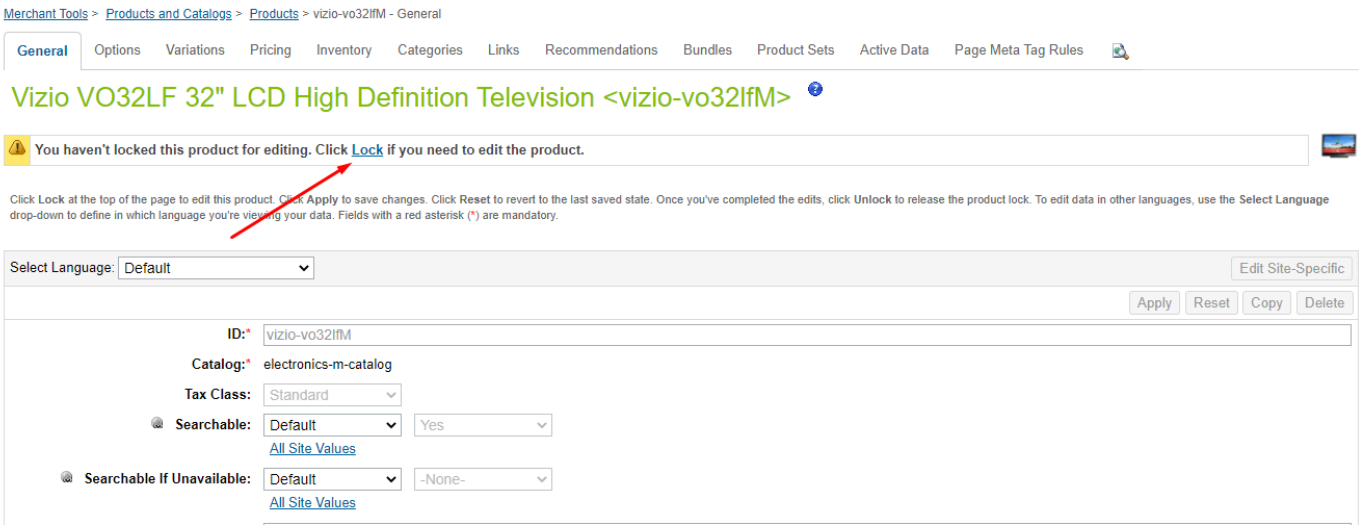
- On the input field search for the ID of the product selected in the Storefront



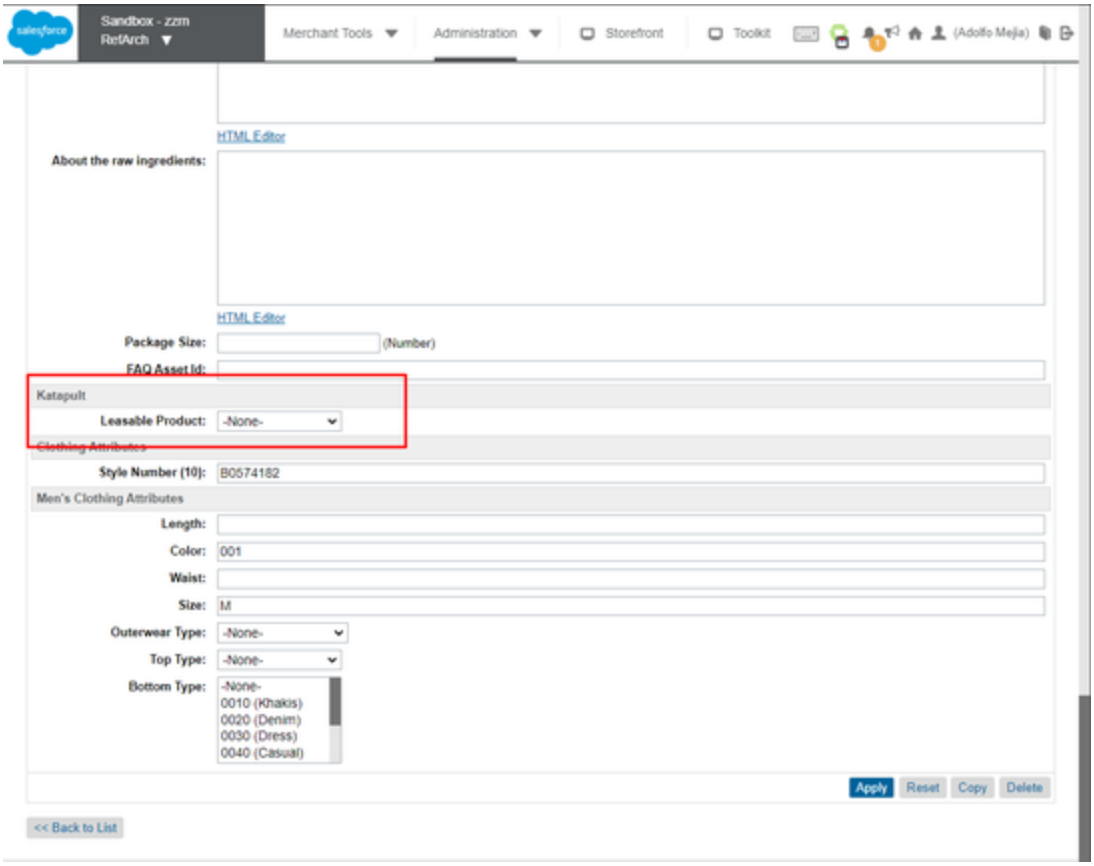
- Click on the ID



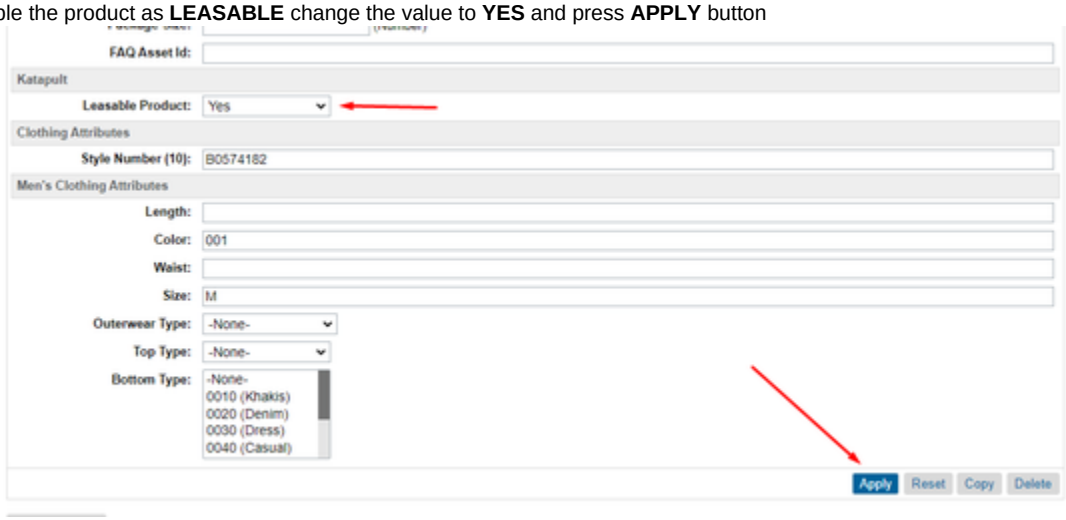
- Click **Lock** to be able to edit the information of the product



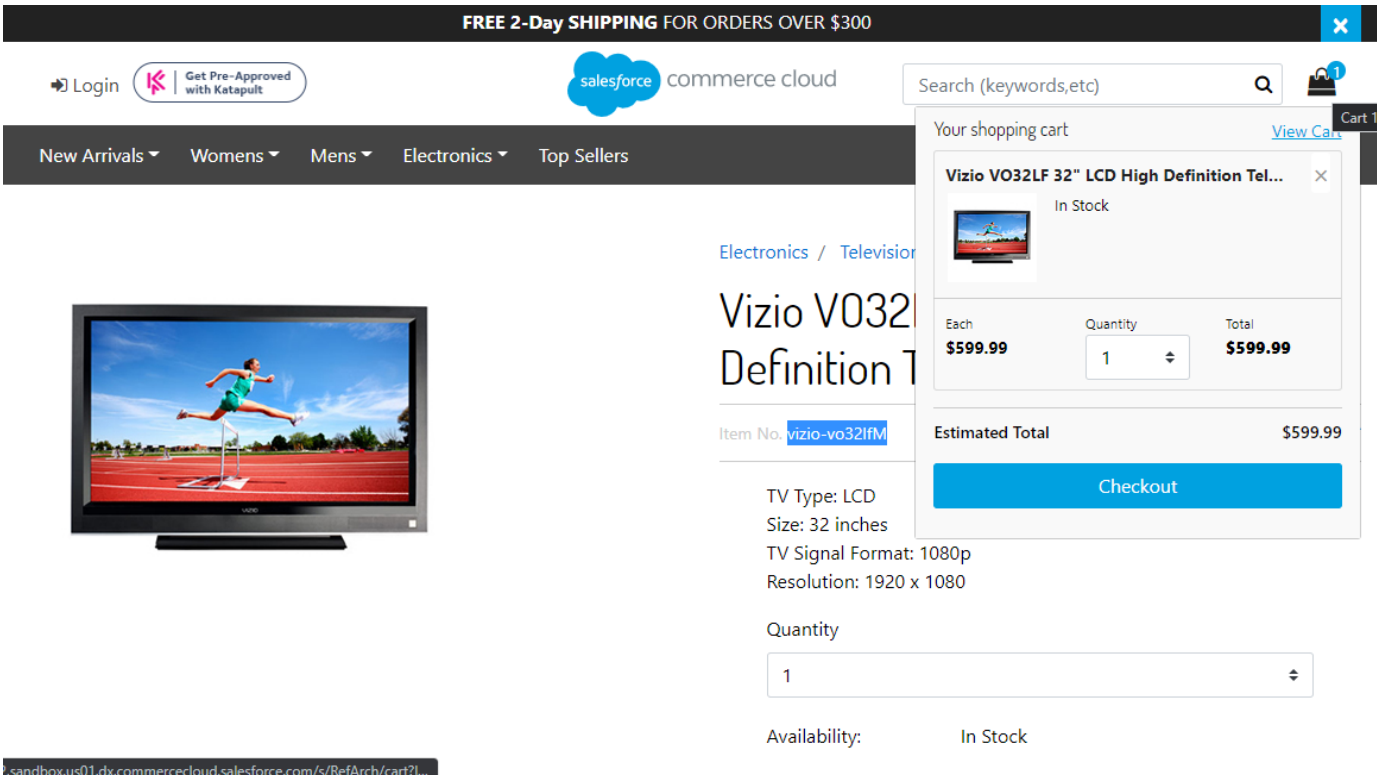
- Scroll down to see all the attributes from the product and you will see the Katapult property, for default is **NONE**, the product is **NOT LEASABLE**



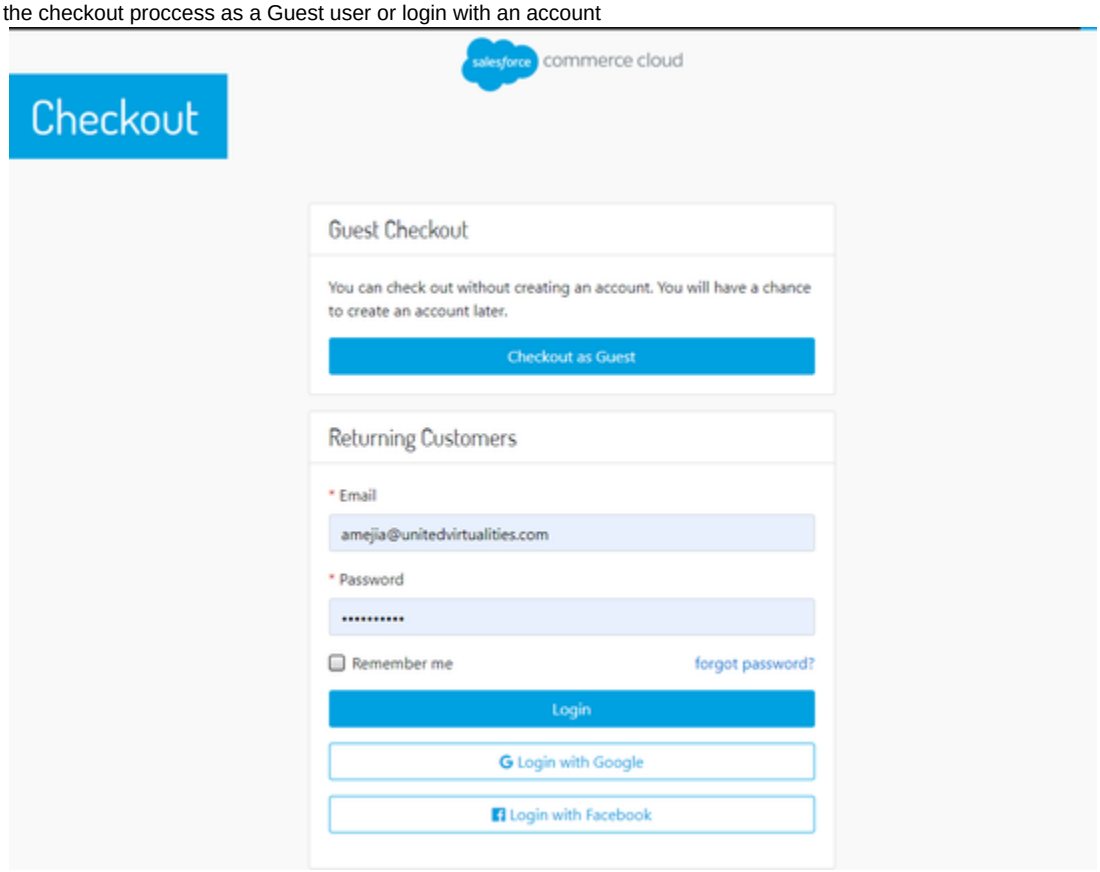
- To enable the product as **LEASABLE** change the value to **YES** and press **APPLY** button



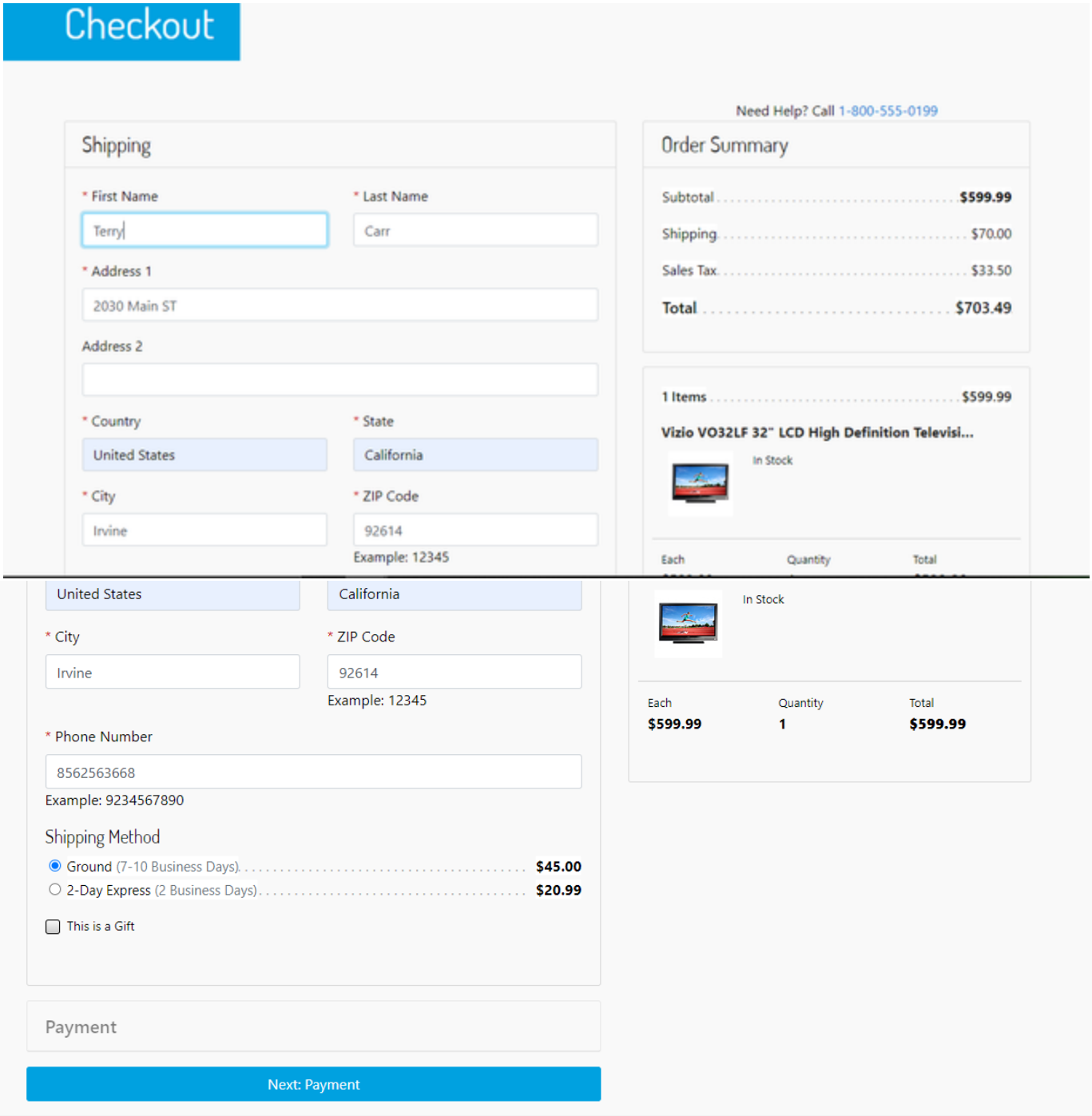
- Once the product selected is set as **Leasable** product, proceed to add it to Cart



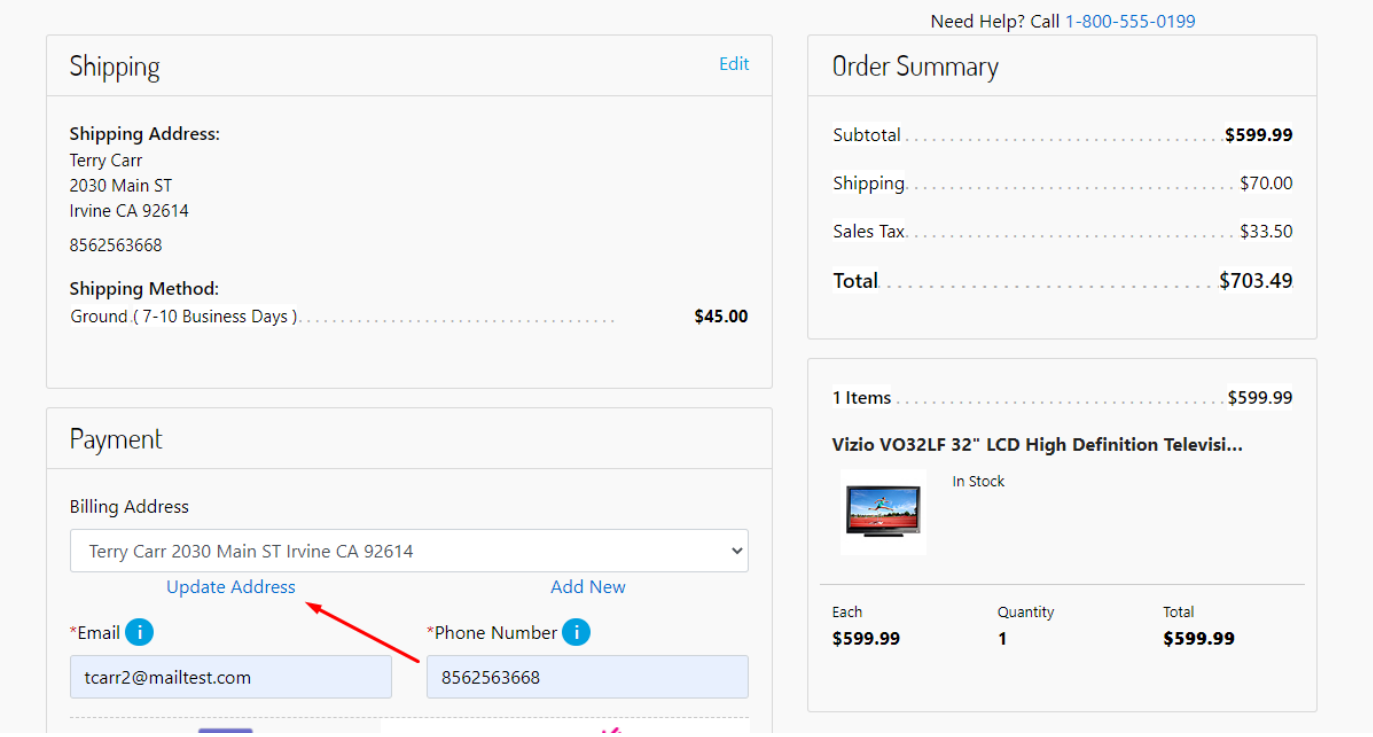
- Go to the checkout proccess as a Guest user or login with an account



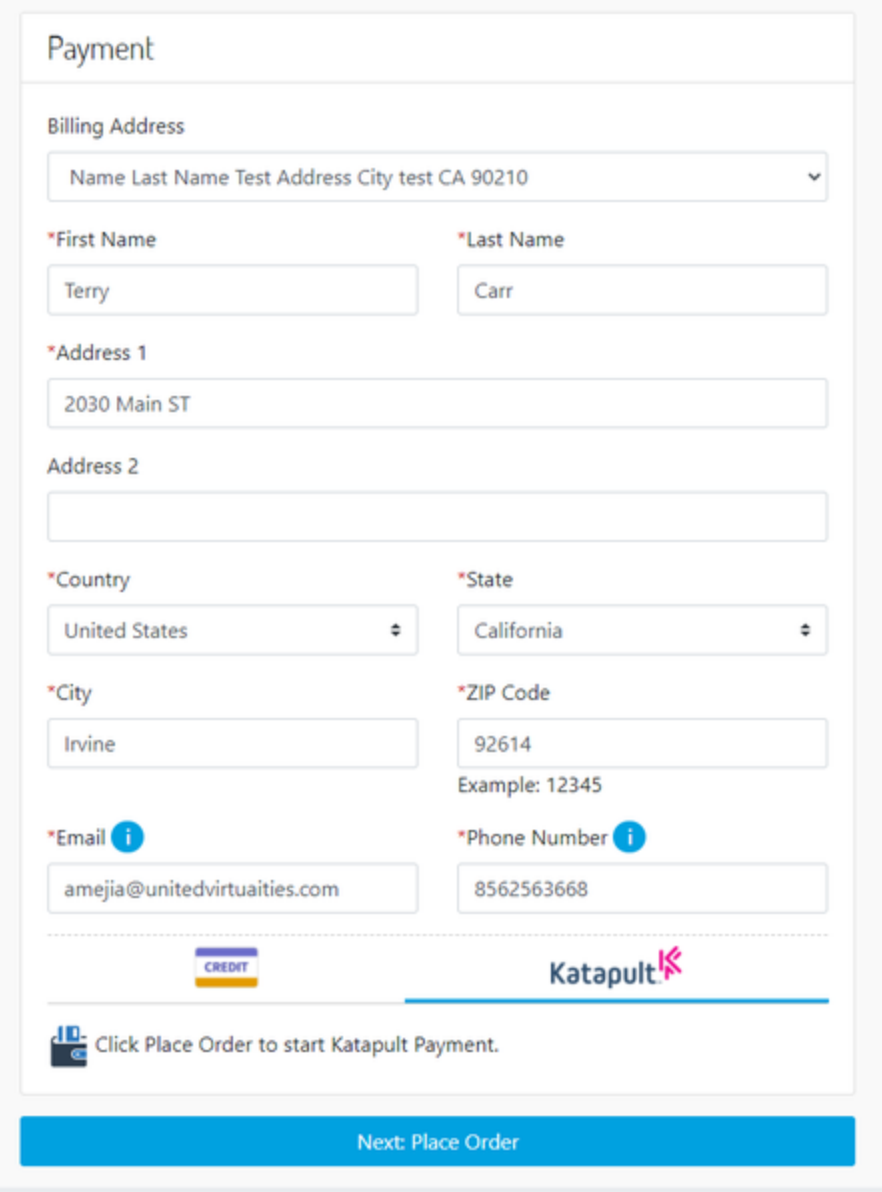
- Fill the Shipping information and press **Next: Payment** button



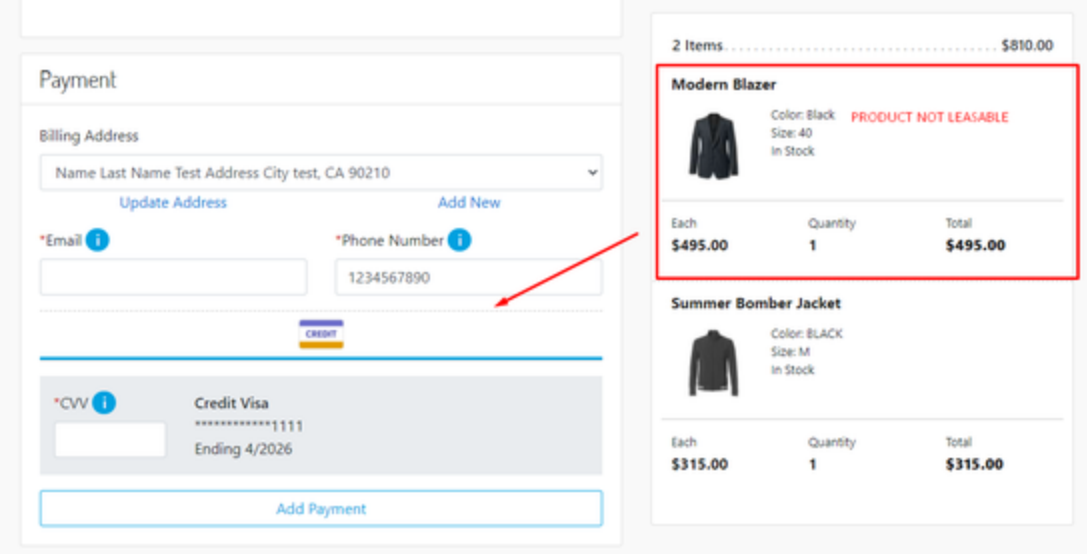
- Set the billing information, if is not the same of the Shipping, press **Update address** and fill the inputs



- Once is set the Payment information, select the **tab** for the **Katapult payment method** and press **Next: Place Order** button



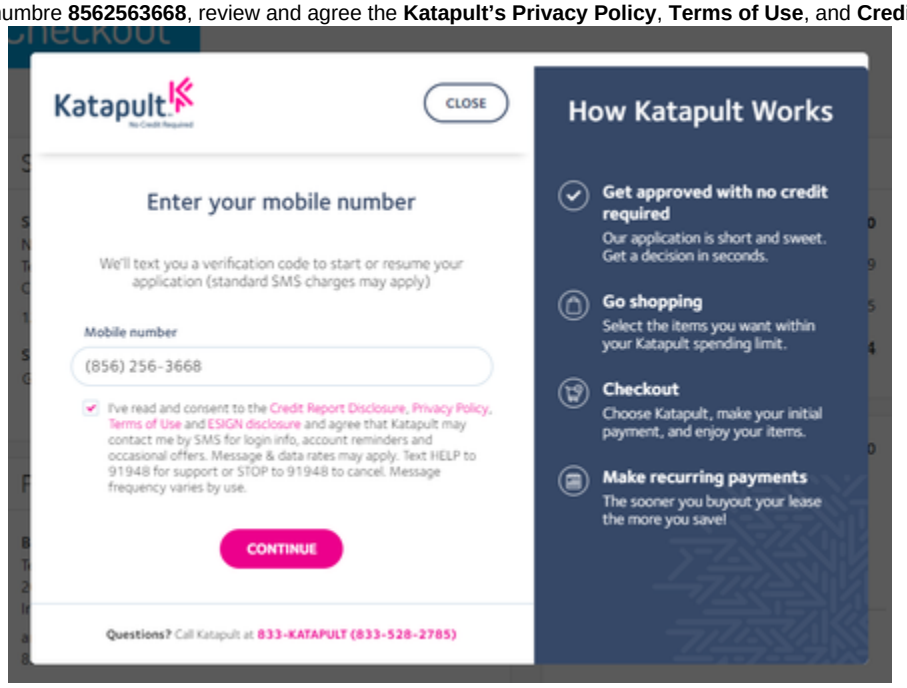
⚠ If all the products selected are not leasable the tab for the Katapult payment method will not be displayed



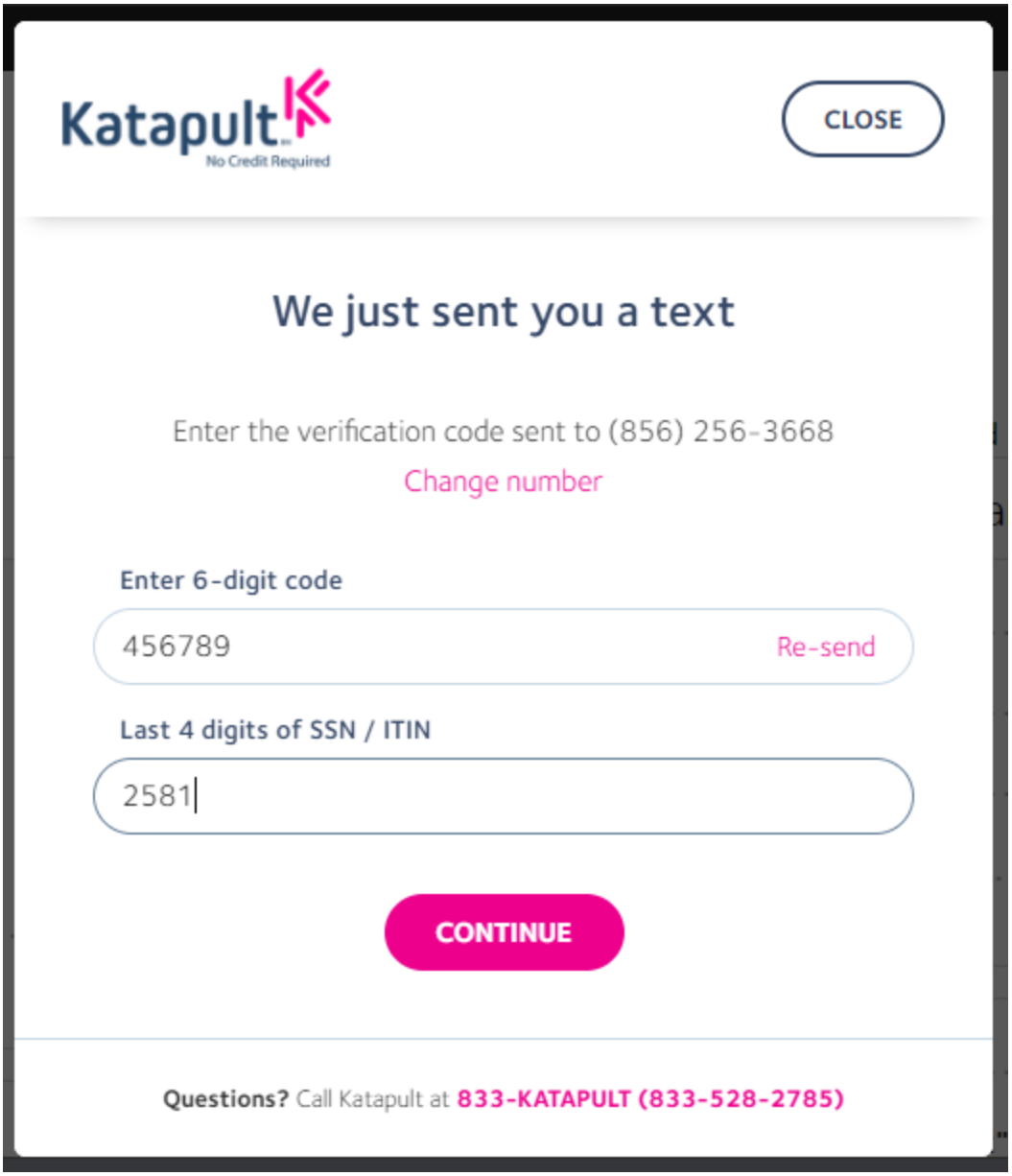
- On the next step a popup will appear to begin the checkout process with Katapult, proceed to add your mobile number to start a lease application for a new or existing Katapult lease

Workflow for registered customers

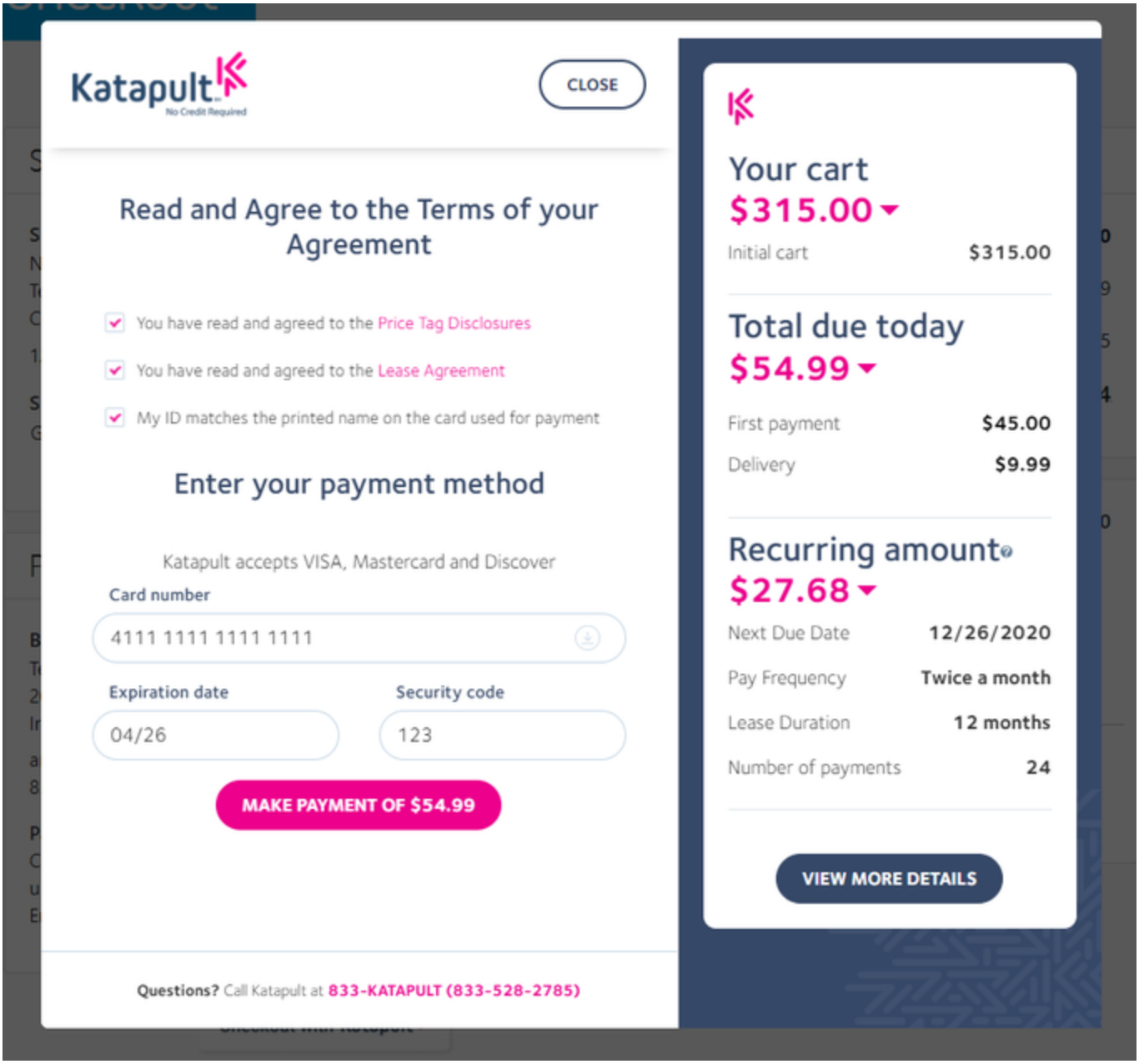
- Add the Mobile numbre **8562563668**, review and agree the **Katapult's Privacy Policy**, **Terms of Use**, and **Credit Report Disclosure**



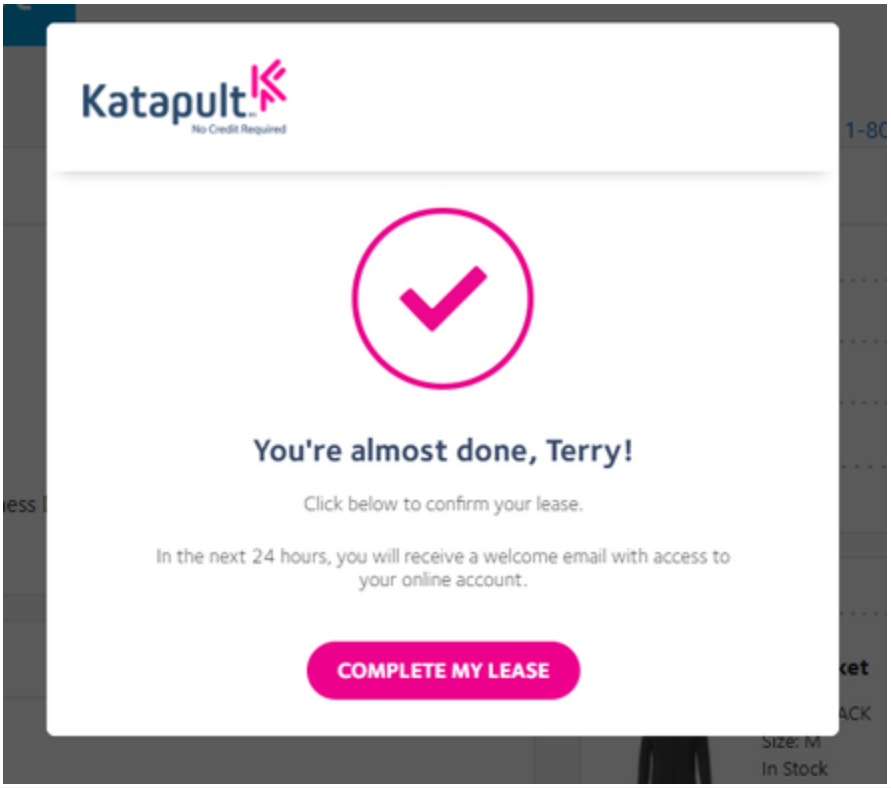
- Add the code received on the text message and the last 4 digits of the SSN / ITIN added on the registration flow
- Introduce **456789** for the code and **2581** for SSN/ITIN



- Review and agree price tag disclosure, lease agreement, and verify your ID before completing your payment and starting your lease.
- The information to test the payment is:
  - Card Number: **4111 1111 1111 1111**
  - Expiration Date: **04/26 (Can be any date ahead)**
  - Security Code : **123**



- Press the **Make Payment** button to place the Order on Katapult and press **Complete My Lease** to place the order on Salesforce



Order date	Order Number	First Name	Last Name	Sales Rep	Status
12-21-2020	**00003011**	Terry	Carr		Current

Receipt

Order Number: 00003011
Order Date: 12/21/20

Shipping Address:
Terry Carr
2030 Main ST
Irvine, CA 92614

8562563668

Shipping Method:
Ground (7-10 Business Days) **$45.00**

Billing Address:
Terry Carr
2030 Main ST
Irvine, CA 92614

tcarr2@mailtest.com
8562563668

Payment:

1 Items $599.99

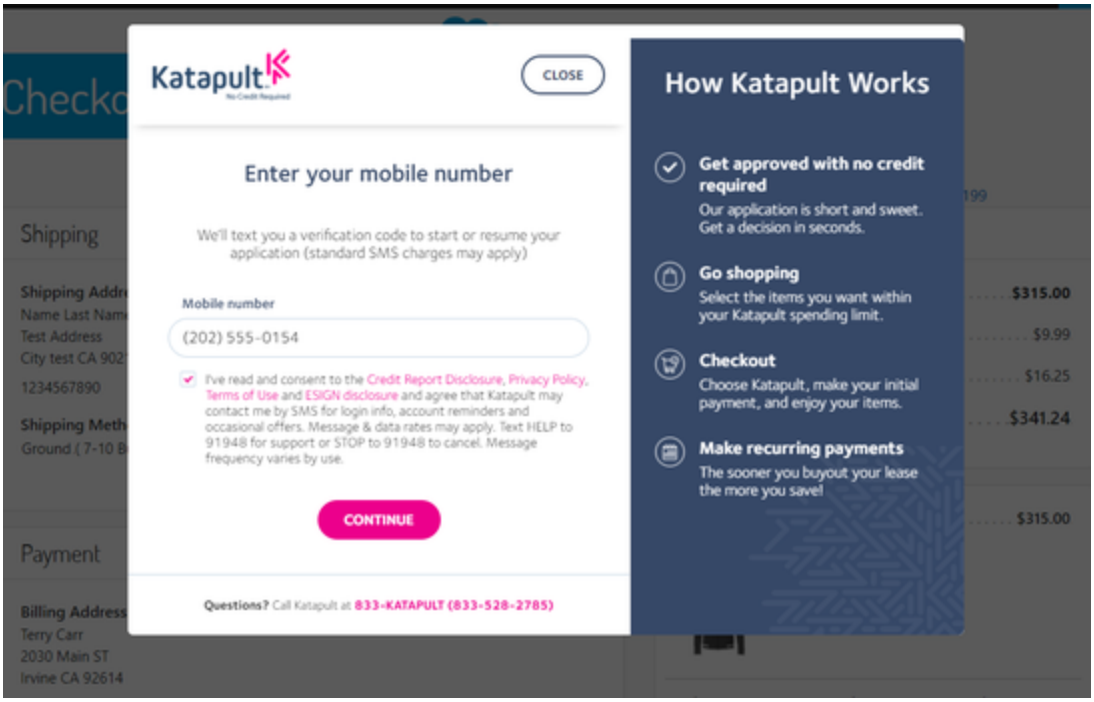
Vizio VO32LF 32" LCD High Definition Television

Quantity	Total
1	**$599.99**

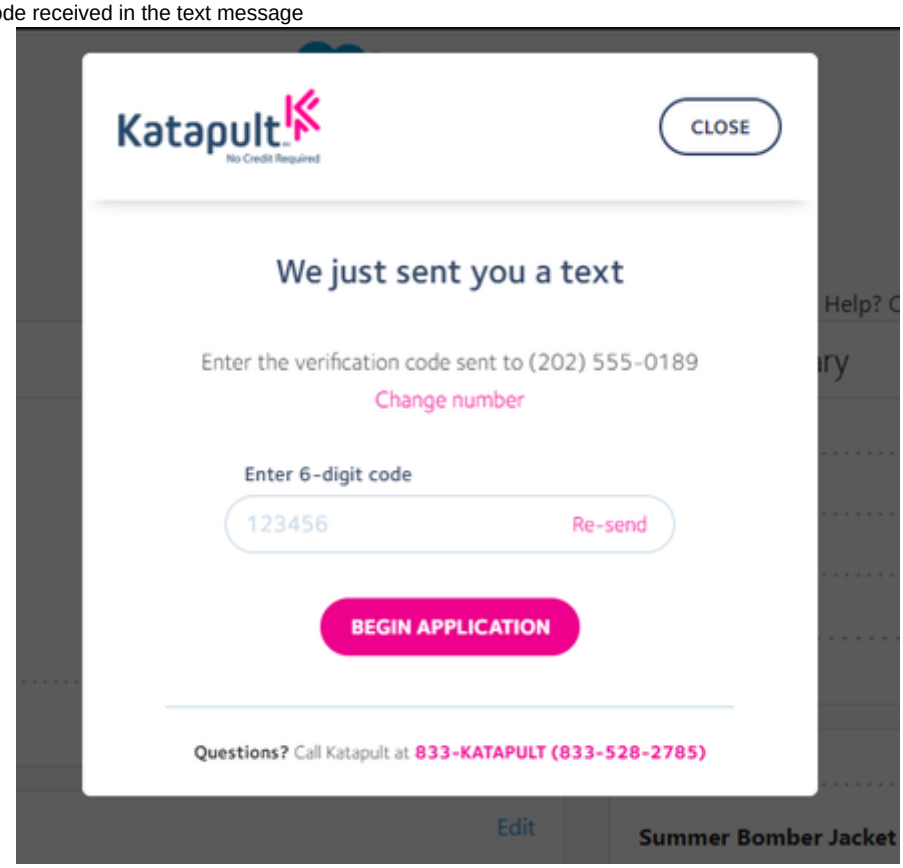
Subtotal	$599.99
Shipping	$70.00
Sales Tax	$33.50
Total	**$703.49**

Workflow for new customers

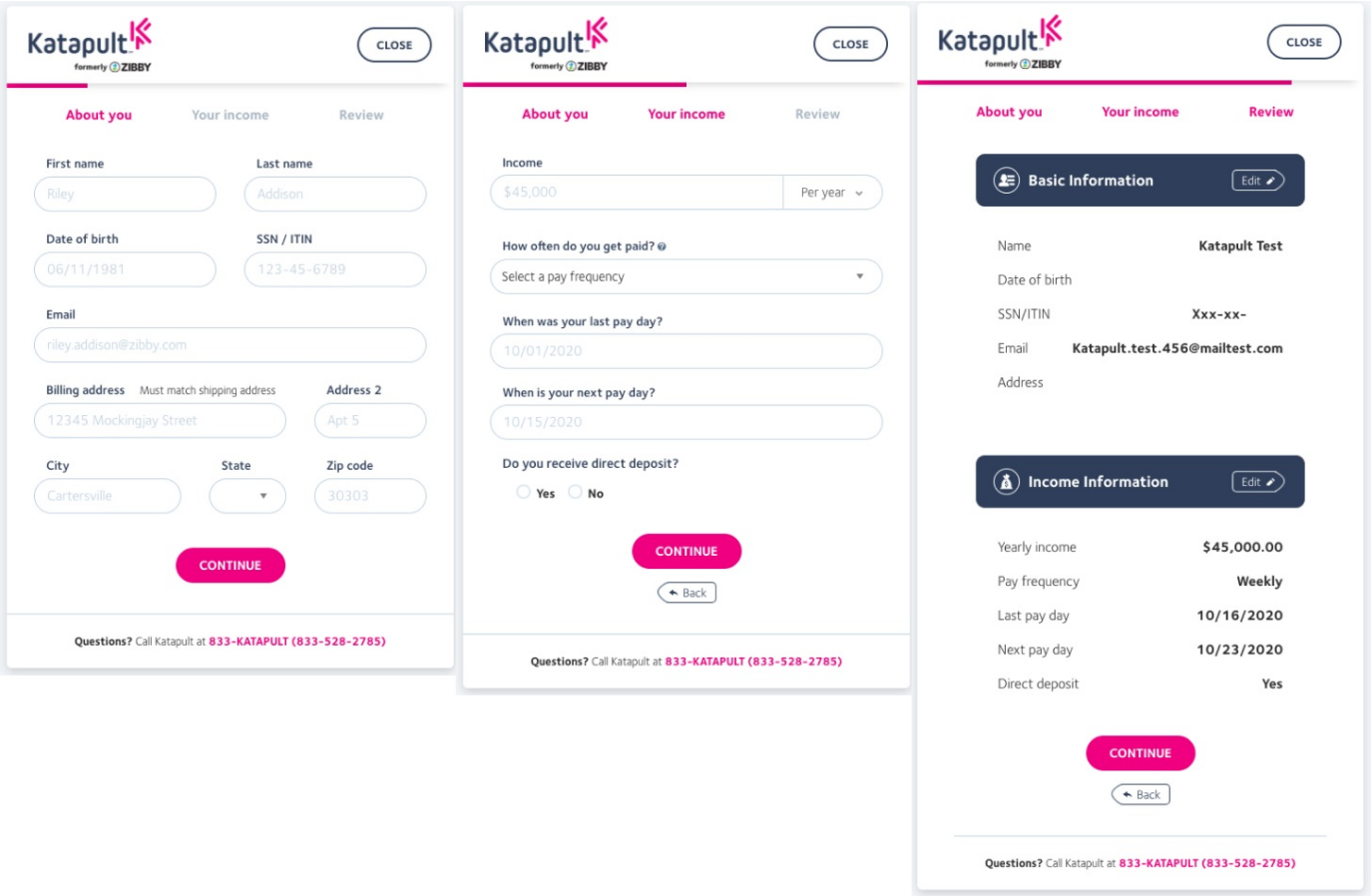
- Insert your phone number



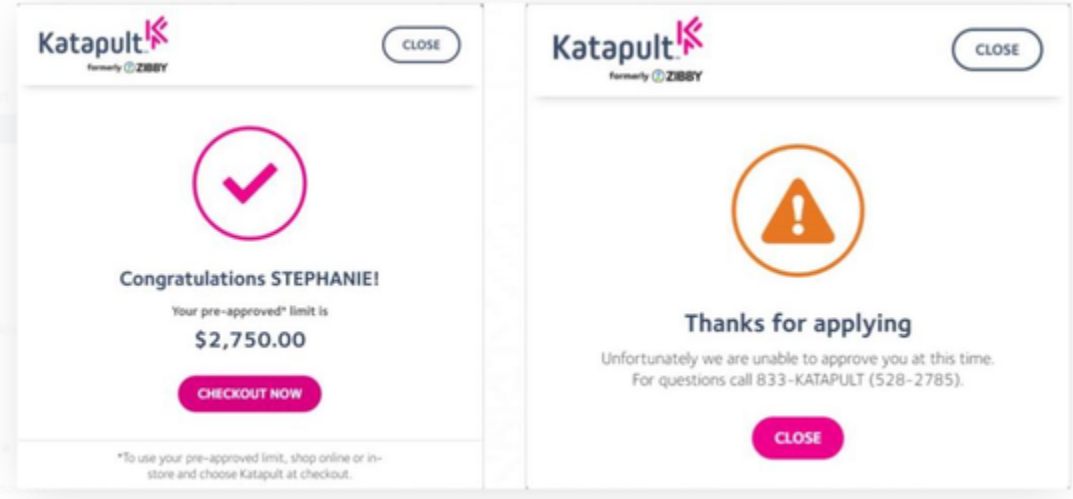
- When a customer starts their application, they will receive a text message, which includes a link to katapult.com/legal to ensure they are reviewing and accepting the terms. The text will also include their 6-digit verification code.
- Introduce the code received in the text message



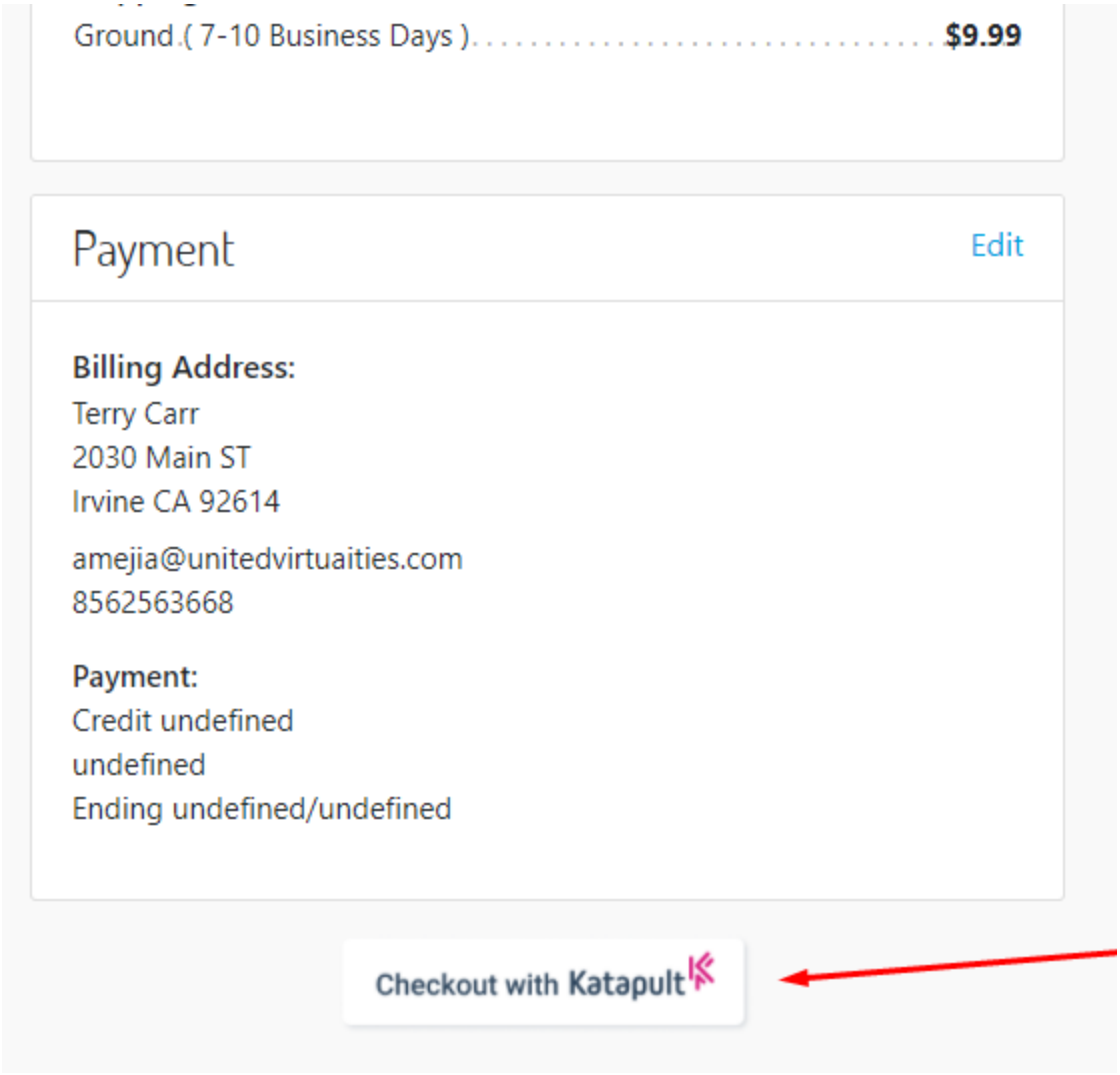
- Katapult's quick application is broken down to 3 simple steps: Basic info, Income, Review.



- Once you fill the information, Katapult will show you a message saying if you were approved or not

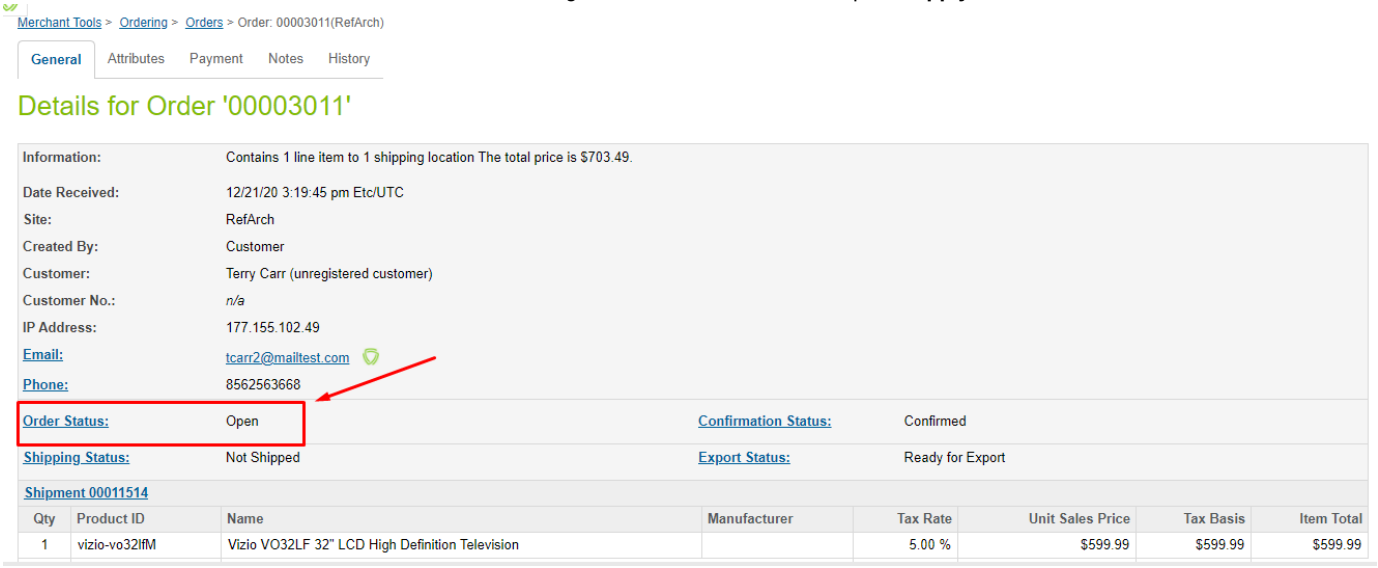


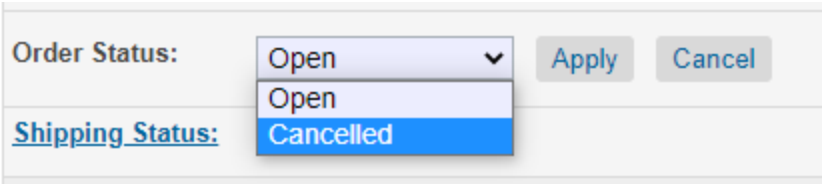
- Once you finish the registration process click on the **Checkout with Katapult** button to open again the popup and start the checkout process with Katapult



Cancel an Order

- To cancel an order in katapult you need go to **Business Manager** and **Merchant Tools > Ordering > Orders**
- Select an order and click in **Order Status** and change the value to **Canceled** and press **Apply**





- Now the order is canceled in Salesforce, to cancel the order in Katapult you need to run a Job. To do this go to **Administration > Operations > Jobs**

Jobs

Our JOBs cover four Methods: **Shipped**, **Cancel, Cancel Item** and **Completed**.

Shipped - Set a delivery date in the Katapult's management.

Cancel - Cancel the entire order.

Completed - Mark an order for not to be reprocessed.

Cancel Item - Cancel the items individually.

Your integration must provide the update line items in the SFCC.

You can Update Line Items through:

OCAPI (Open Commerce API)

- Add a Hook to POST order update to the cancel item endpoint. Like below:

```
var orderTest = OrderMgr.getOrder("00001301");
Transaction.wrap(function(){

        for(i in order.productLineItems){
        //Here goes a test in order to verify which line item has to be canceled.
        orderTest.productLineItems[i].externalLineItemStatus = "canceled";
        orderTest.productLineItems[i].custom.KAT_cancelItem = true;
    }

});
```

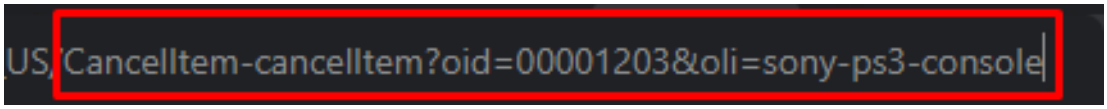
XML

- The xml file must have a content like below:

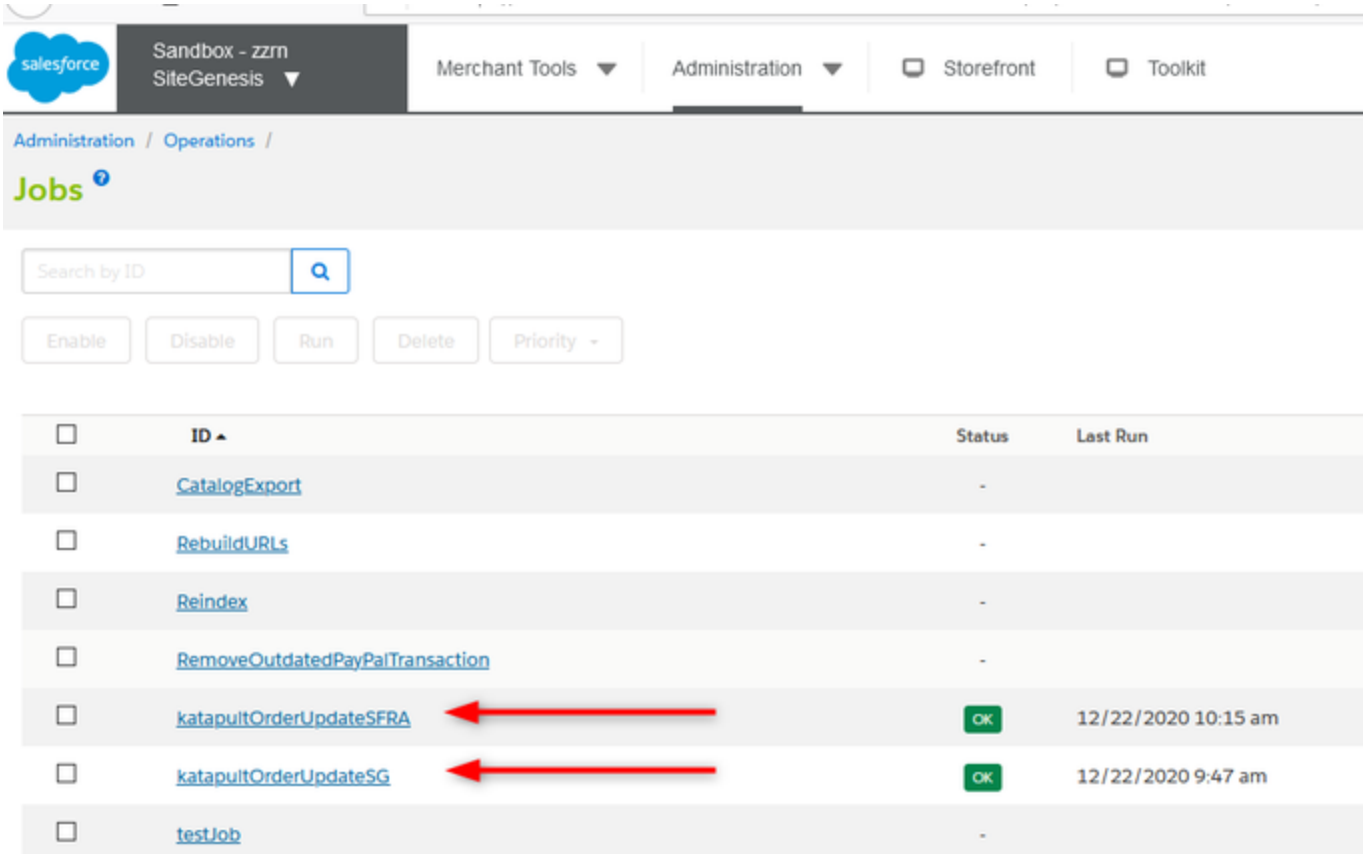
```
<external-line-item-status>canceled</external-line-item-status>
<custom-attributes>
    <custom-attribute attribute-id="KAT_cancelItem">true</custom-attribute>
```

A test controller was created. In this controller we pass the parameters in the url, where the "CancelItem" is the controller, "cancelItem" is the method, "oid" is the order ID and the "oli" is order line item. See a example url below:

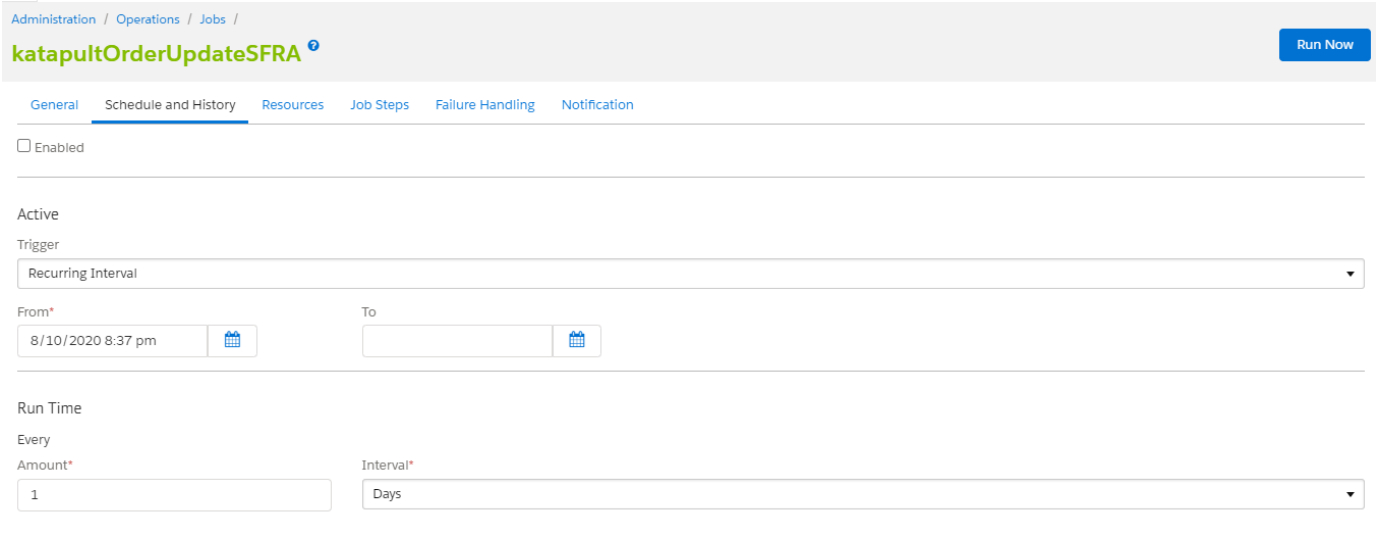
https://www.yoursite.com/CancelItem-cancelItem?oid=00001203&oli=sony-ps3-console



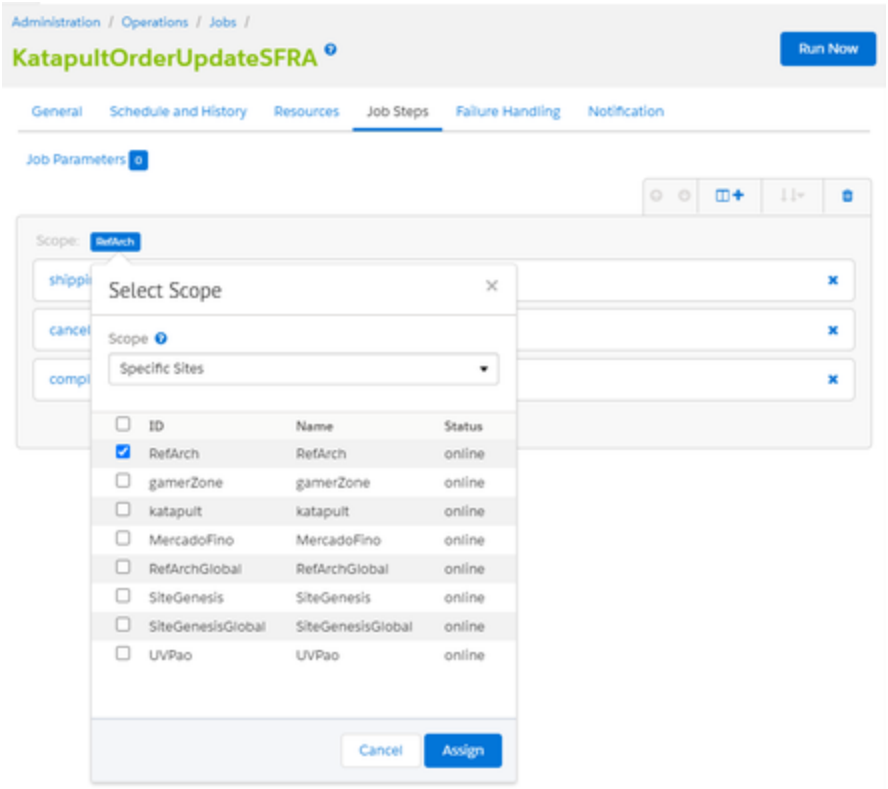
To avoid change Scope everytime, was created one JOB to SFRA and another to SiteGenesis:



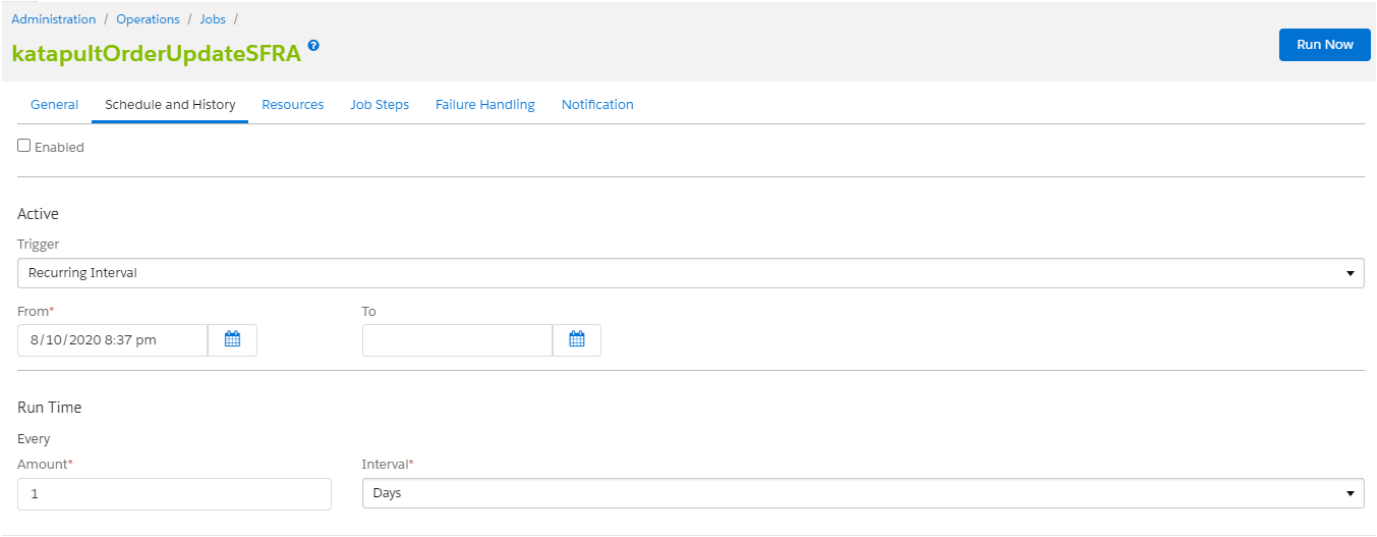
- Go to **Administration > Operations > Jobs**
- Open the job **katapultOrderUpdateSRFA**



- Verify that the **steps** has selected the **Scope** option for your SFRA site, go to tab **Job Steps**
- Select your RefArch scope and press **Assign**



- Press the button **Run Now** to execute it, this job will update in Katapult's platform the **Delivery Date**, the orders to **Canceled,** the orders with **Canceled Items** and the **Completed** orders to not be reprocessed
- You will see that the job was completed at the bottom of the page in the **Schedule and History** Tab, as well as the log file that includes what orders were updated in the Katapult platform



Run Only On These Days:

☑ Monday ☑ Tuesday ☑ Wednesday ☑ Thursday ☑ Friday ☑ Saturday ☑ Sunday

Job History

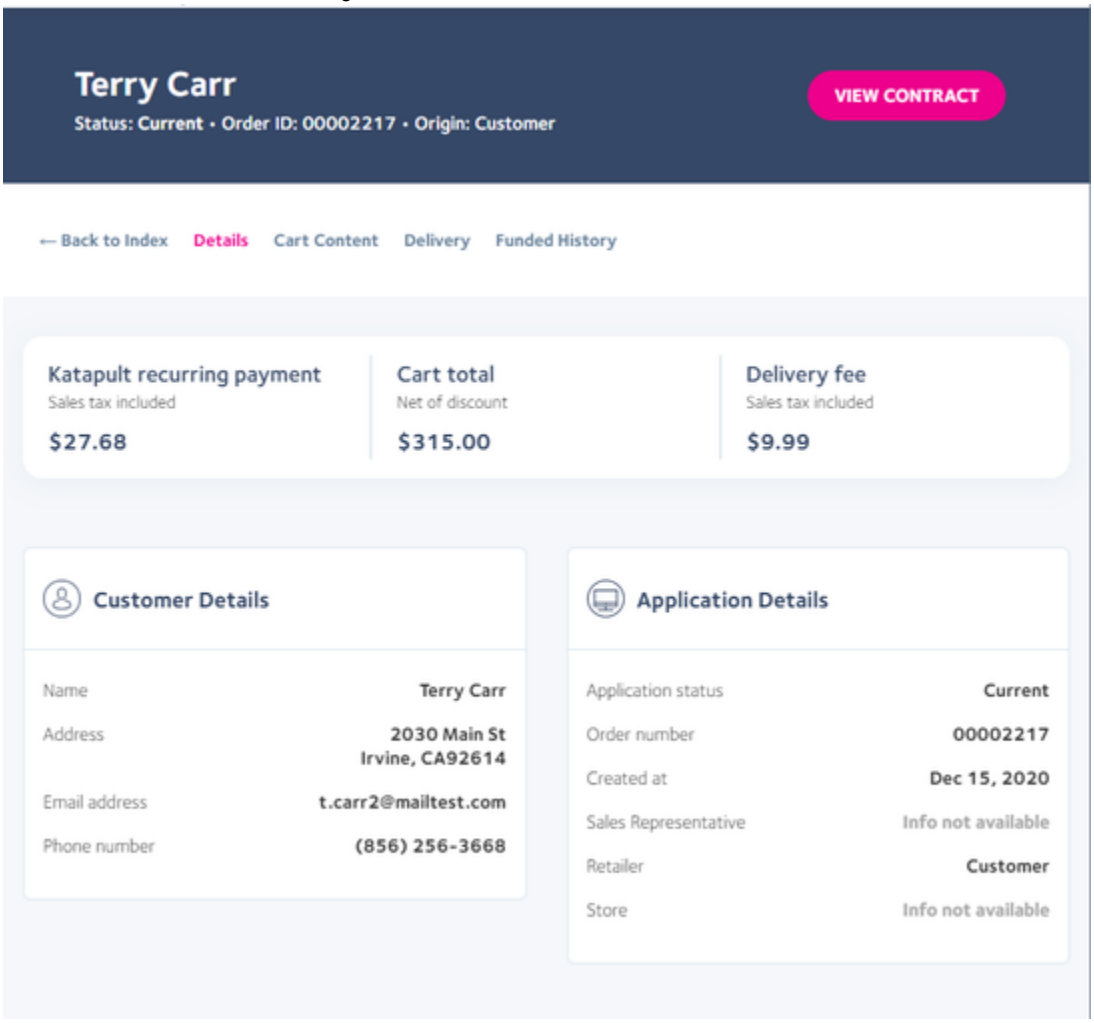
Refresh

ID	Execution Scope	Status	Start Time	End Time	Duration	Log File
katapultOrderUpdateSFRA	RefArch	OK	12/22/2020 11:50 am by amit.verma@katapult.com	12/22/2020 11:50 am	0:00:01	
katapultOrderUpdateSFRA	RefArch	OK	12/22/2020 11:47 am by amit.verma@katapult.com	12/22/2020 11:47 am	0:00:00	
katapultOrderUpdateSFRA	RefArch	OK	12/22/2020 10:15 am by amit.verma@katapult.com	12/22/2020 10:15 am	0:00:01	
katapultOrderUpdateSFRA	RefArch	OK	12/22/2020 10:14 am by amit.verma@katapult.com	12/22/2020 10:14 am	0:00:00	
katapultOrderUpdateSFRA	RefArch	OK	12/22/2020 10:08 am by amit.verma@katapult.com	12/22/2020 10:08 am	0:00:02	
katapultOrderUpdateSFRA	RefArch	OK	12/22/2020 10:06 am by amit.verma@katapult.com	12/22/2020 10:06 am	0:00:00	
katapultOrderUpdateSFRA	RefArch	OK	12/22/2020 7:28 am by ciacerda@unitedvirtualities.com	12/22/2020 7:28 am	0:00:02	

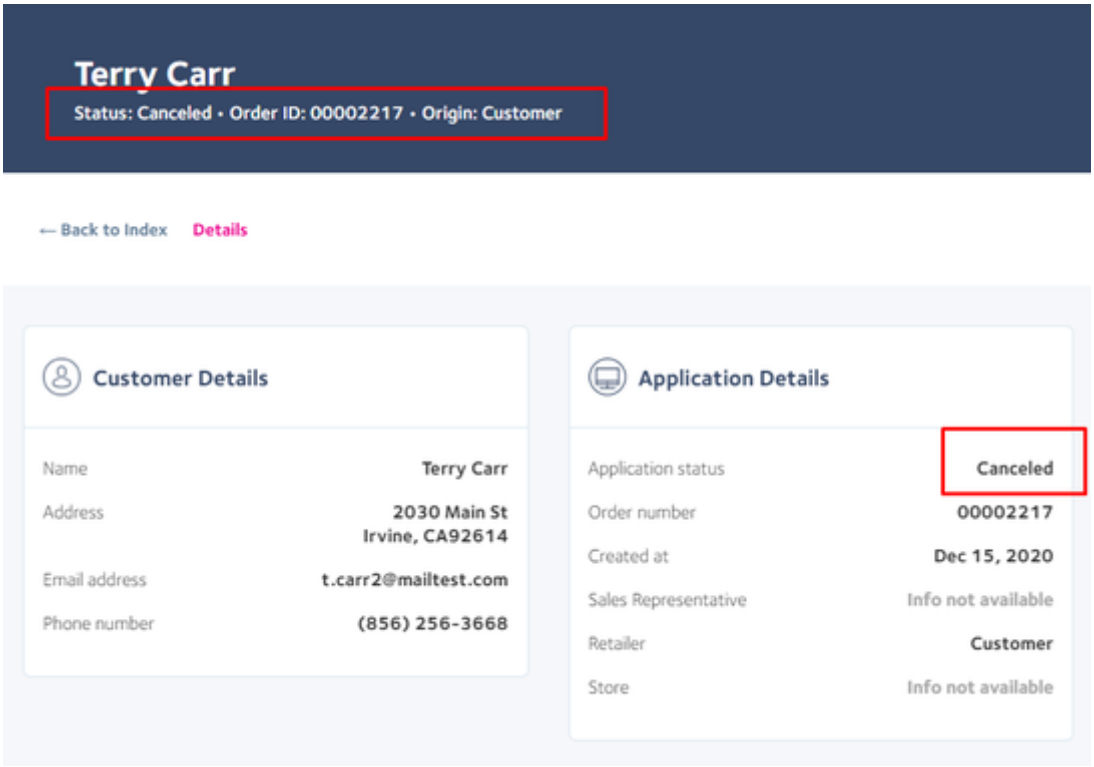
- This is a row of the log from the order we canceled before in Salesforce, that includes information about the order number and the ID from Katapult's platform

```
[2020-12-16 18:39:19.145 GMT] INFO CustomJobThread|585274883|katapultOrderUpdate|ordersFunctions-cancel --> Canceled order 00002217
-- kat_uid -->827b3c61b38b409bbba41572e64e9d16
```

- This is how it looks the order before running the Job in Salesforce

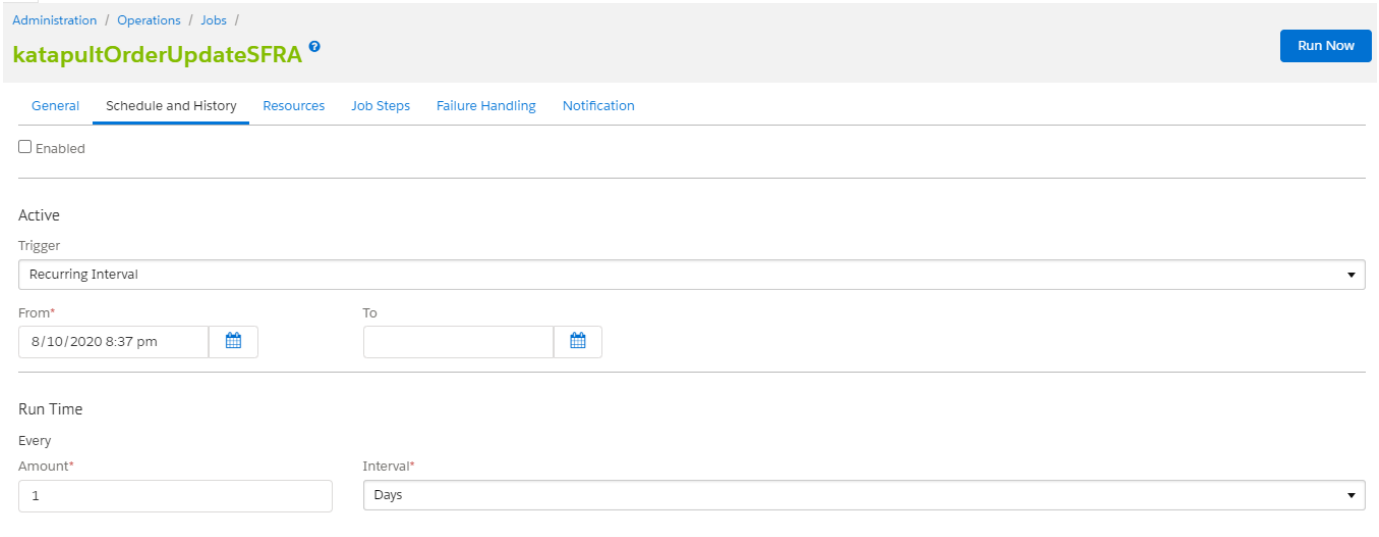


- And this is the status of the order after running the Job

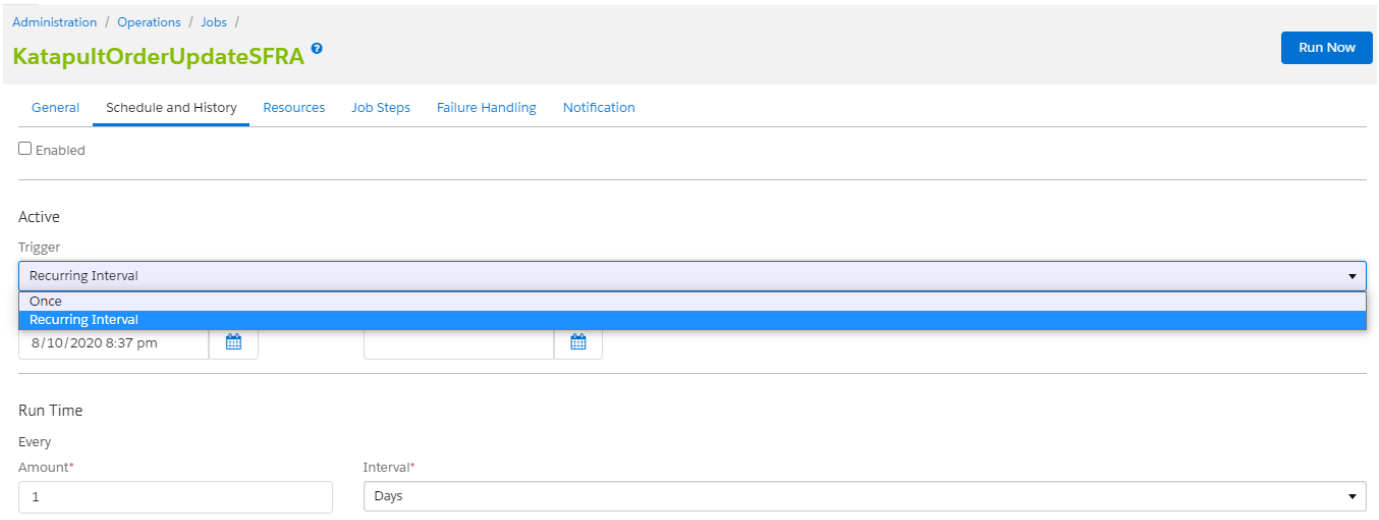


Configuring Job Schedules

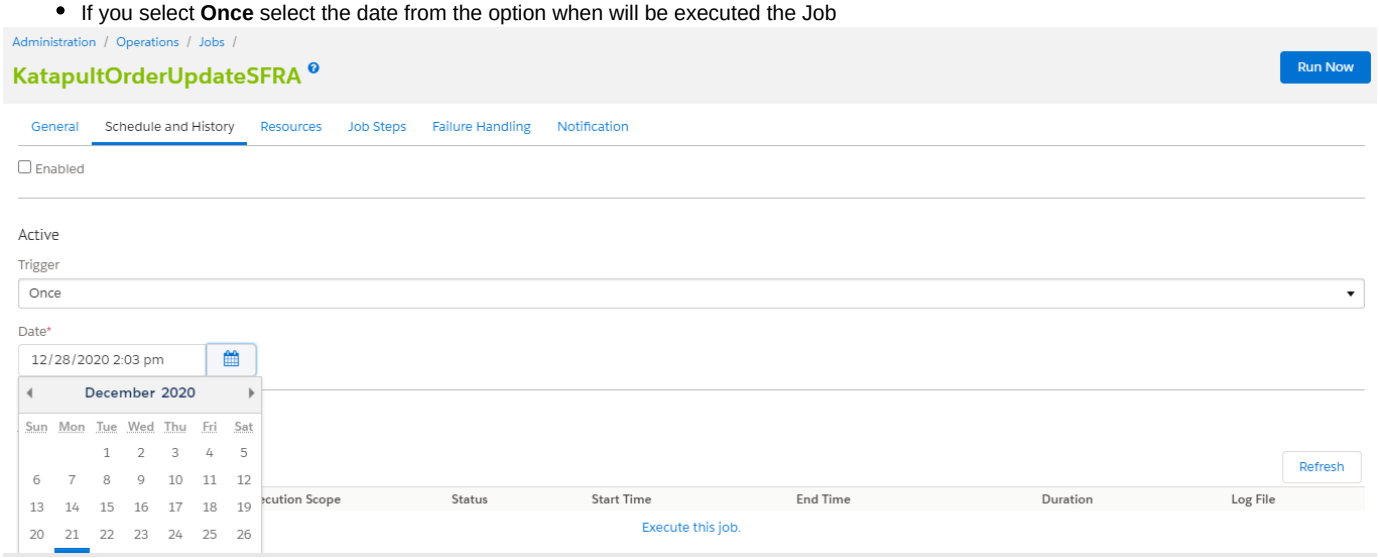
- To configure schedules in Katapult job go to **Administration > Operations >Jobs** and open **katapultOrderUpdateSFRA** Job
- Go to the tab **Schedule and History**



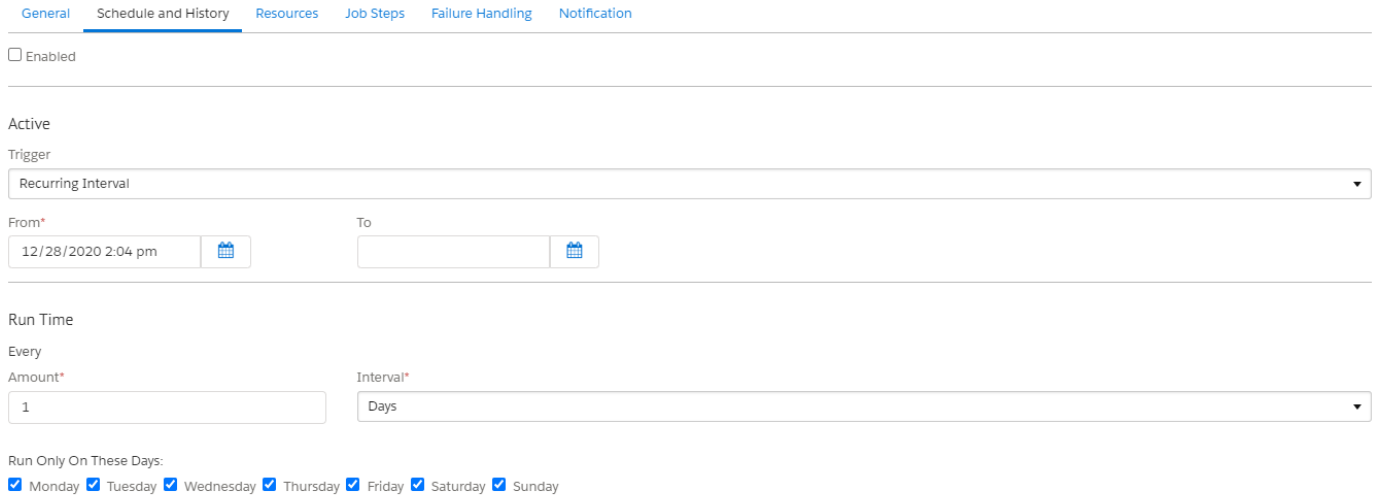
- Configure when will be triggered the job, **Once** or **Recurring**



- If you select **Once** select the date from the option when will be executed the Job

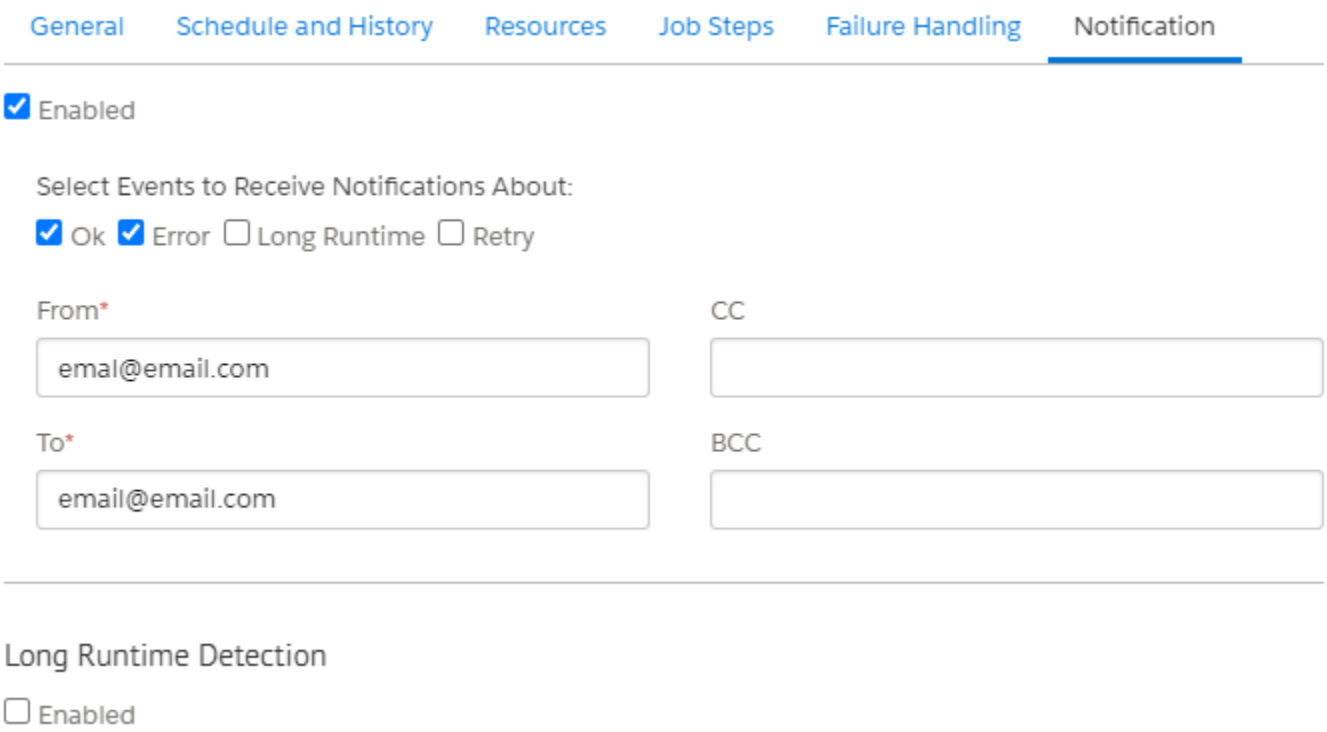


- If you selected **Recurring Interval** select the date from when will starts the job and others parameters like how many times will be ejecuted the Job, this is in the input **Amount**, **Interval** is to set with minutes, hours, days, weeks or months and for last, the **days** when will be executed the Job



Configuring Job Email Notifications

- To configure schedules in Katapult job go to **Administration > Operations > Jobs** and open the **katapultOrderUpdateSFRA** Job
- Go to the tab **Notifications**
- Select the events you want notifications, add emails and automatically changes will be saved

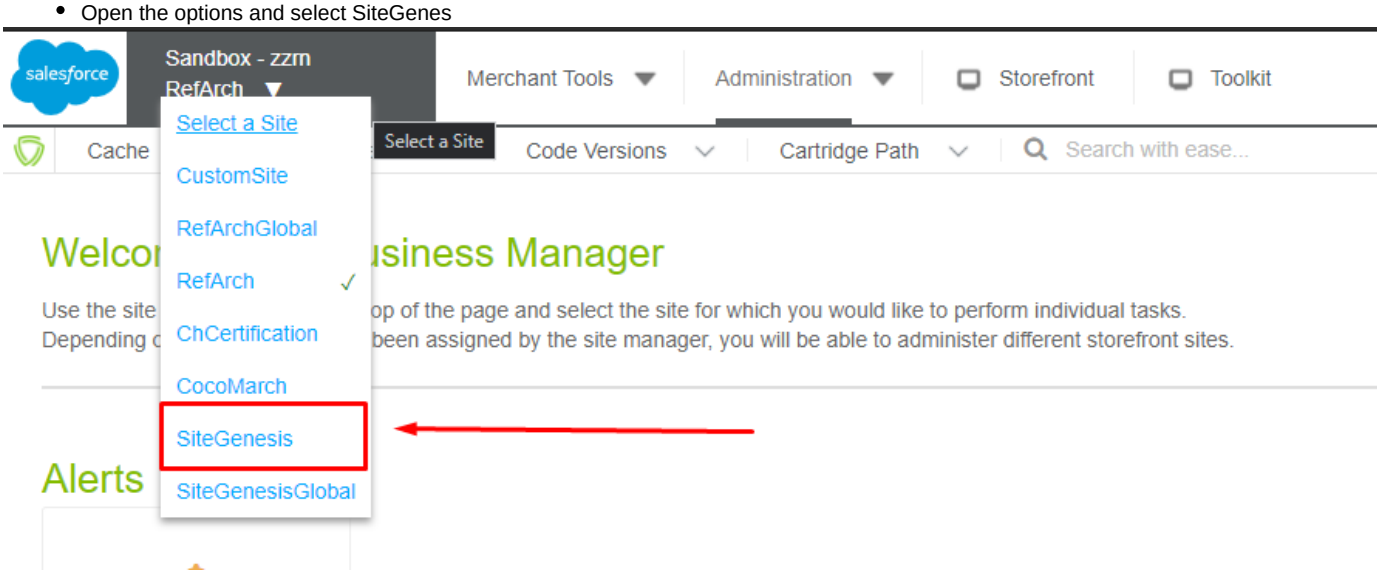


- After run the Job you will receive an email like this

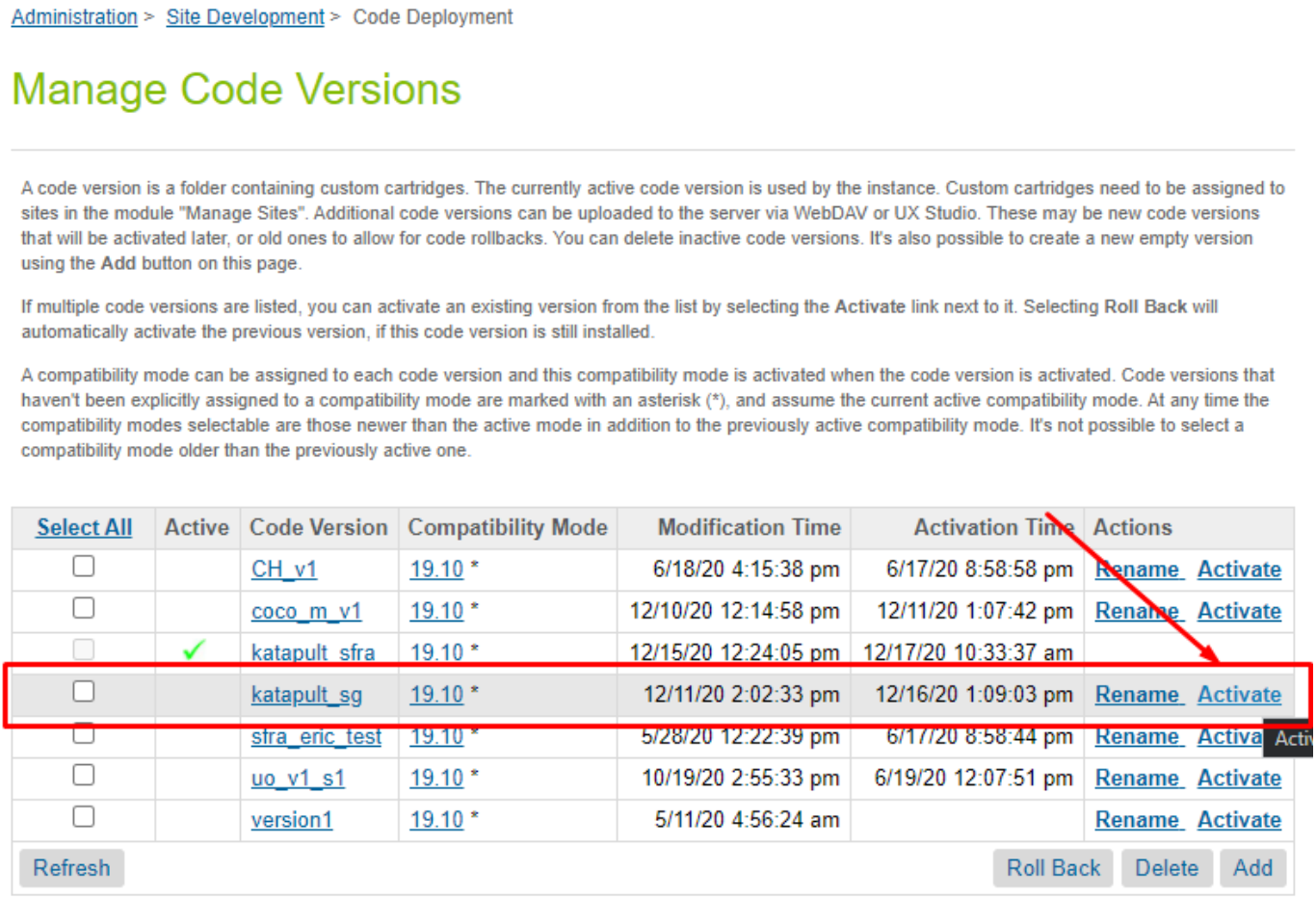
```
Exit Status: OK

Instance Type: SANDBOX
Job: KatapultOrderUpdateSFRA
Description: N/A
Start Time: 1:13:38 am, Dec 24, 2020
End Time: 1:13:38 am, Dec 24, 2020
Duration: 0.60 seconds

Steps:

Step: shipping
Execution Scope: RefArch
Description: N/A
Exit Status: OK
Start Time: 1:13:38 am, Dec 24, 2020
End Time: 1:13:38 am, Dec 24, 2020
Duration: 0.10 seconds

Step: cancel
Execution Scope: RefArch
Description: N/A
Exit Status: OK
Start Time: 1:13:38 am, Dec 24, 2020
End Time: 1:13:38 am, Dec 24, 2020
Duration: 0.10 seconds

Step: complete
Execution Scope: RefArch
Description: N/A
Exit Status: OK
Start Time: 1:13:38 am, Dec 24, 2020
End Time: 1:13:38 am, Dec 24, 2020
```

Switch site to SiteGenesis

- Open the options and select SiteGenes

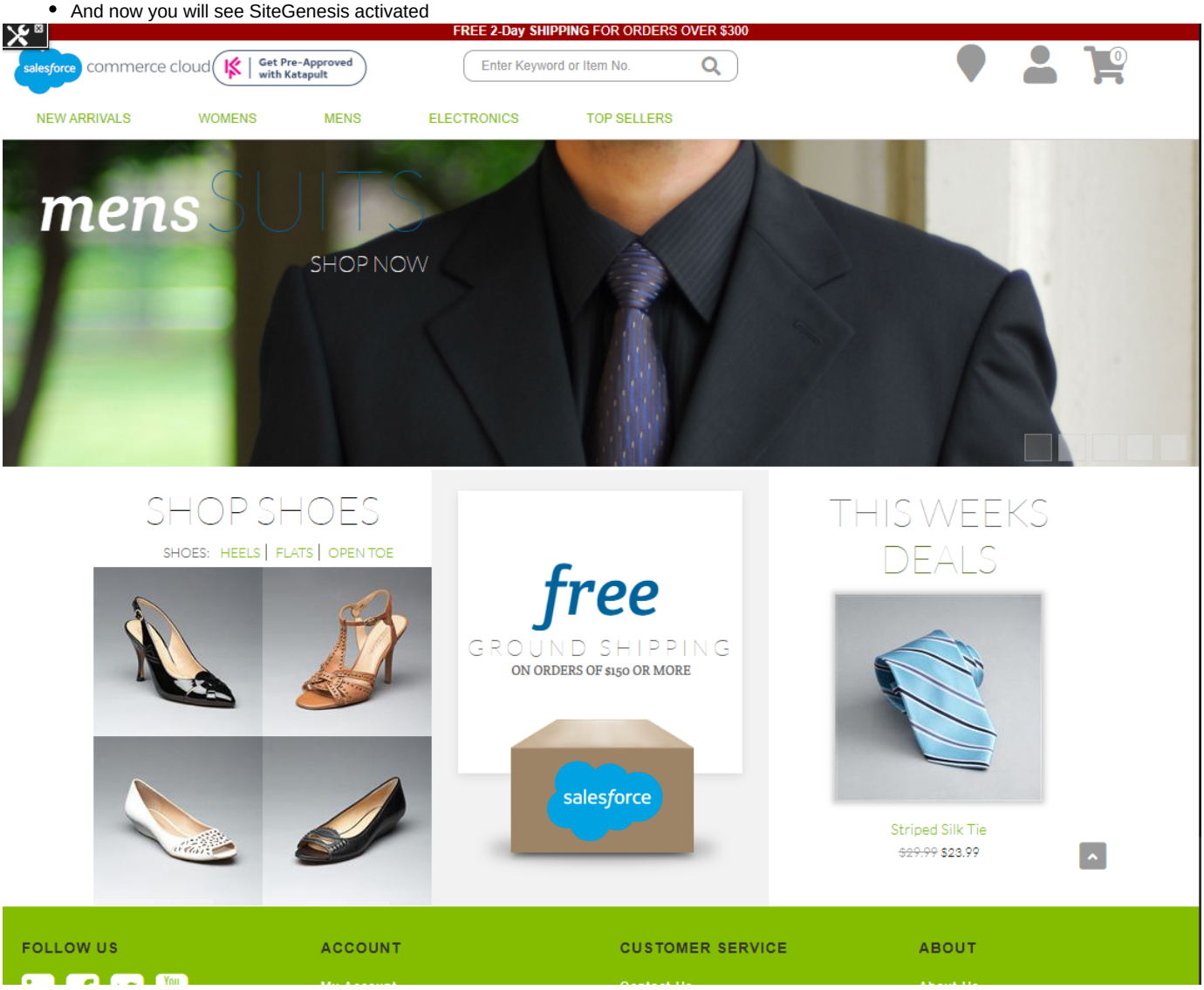


- Change the code version in **Administration > Site Development > Code Deployment**, locate the code version **katapult_sg** and pres in **Activate**



- The code version will be marked

Select All	Active	Code Version	Compatibility Mode	Modification Time	Activation Time	Actions
☐		CH_v1	19.10 *	6/18/20 4:15:38 pm	6/17/20 8:58:58 pm	Rename Activate
☐		coco_m_v1	19.10 *	12/10/20 12:14:58 pm	12/11/20 1:07:42 pm	Rename Activate
☐		katapult_sfra	19.10 *	12/15/20 12:24:05 pm	12/17/20 10:33:37 am	Rename Activate
☐	✓	katapult_sg	19.10 *	12/11/20 2:02:33 pm	12/17/20 10:28:18 pm	
☐		sfra_eric_test	19.10 *	5/28/20 12:22:39 pm	12/17/20 10:28:10 pm	Rename Activate
☐		uo_v1_s1	19.10 *	10/19/20 2:55:33 pm	6/19/20 12:07:51 pm	Rename Activate
☐		version1	19.10 *	5/11/20 4:56:24 am		Rename Activate

Refresh | Roll Back | Delete | Add

- And now you will see SiteGenesis activated