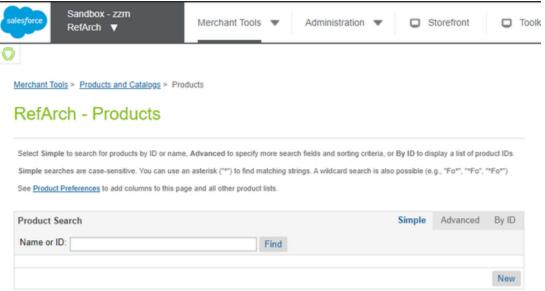
## User Guide SFRA - Create, Place and Cancel an Order with Katapult

• 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





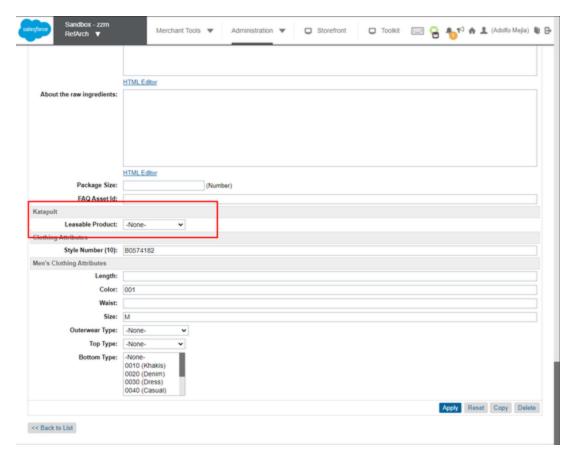
Click on the ID

All Site Values

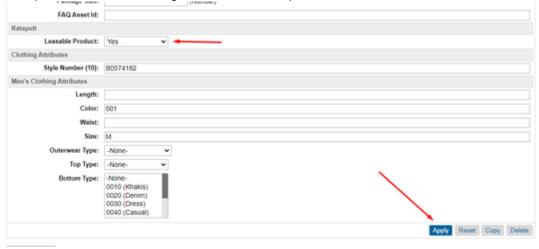
#### RefArch - Products

Simple searches are case-sensitive. You can use an asterisk (""") to find matching strings. A wildcard search is also possible (e.g., "Fo", "\*Fo", "\*Fo", "\*Fo") See Product Preferences to add columns to this page and all other product lists. Simple Advanced By ID Product Search Name or ID: vizio-vo32lfM Find Select All ID Catalog Color Refinement Color Type Status vizio-vo32lfM Vizio VO32LF 32" LCD High Definition Television Electronics Master Catalog Product 🔊 🕫 🔍 🖭 Edit All Edit Selected Assign New Copy Delete Showing 1 - 1 of 1 items • Click Lock to be able to edit the information of the product Merchant Tools > Products and Catalogs > Products > vizio-vo32lfM - General General Options Variations Pricing Inventory Categories Links Recommendations Bundles Product Sets Active Data Page Meta Tag Rules 🖹 Vizio VO32LF 32" LCD High Definition Television <vizio-vo32lfM> 9 4 You haven't locked this product for editing. Click Lock if you need to edit the product. Click Lock at the top of the page to edit this product Apply to save changes. Click Reset to revert to the last saved state. Once you've completed the edits, click Unlock to release the product lock. To edit data in other languages, use the Select Language drop-down to define in which language you're viewing your data. Fields with a red asterisk (\*) are mandatory Select Language: Default Apply Reset Copy Delete ID:\* vizio-vo32lfM Catalog:\* electronics-m-catalog Searchable: Default Yes All Site Values Searchable If Unavailable: Default ✓ -None-

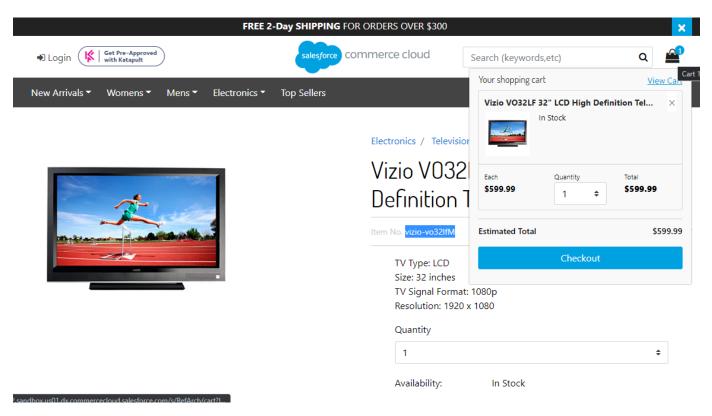
• Scroll down to see all the attributes from the product and you will see the Katapult property, for default is **NONE**, the product is **NOT LEASABLE** 



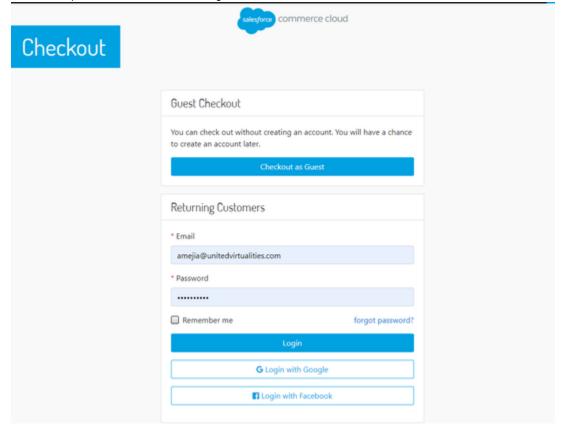
• To enable the product as **LEASABLE** change the value to **YES** and press **APPLY** button



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



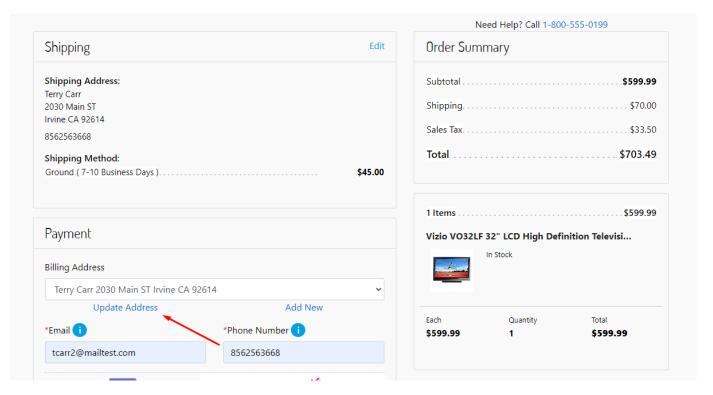
• Go to the checkout proccess as a Guest user or login with an account



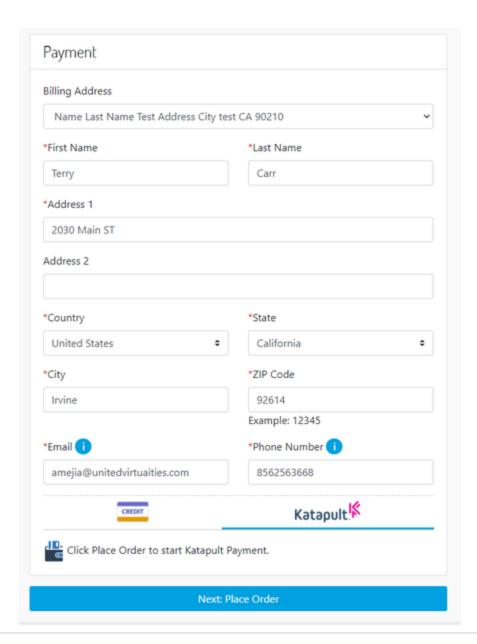
• Fill the Shipping information and press Next: Payment button

#### Checkout Need Help? Call 1-800-555-0199 Shipping Order Summary \* First Name \* Last Name Terry Shipping. .....\$70.00 \* Address 1 2030 Main ST Address 2 \* Country \* State Vizio VO32LF 32" LCD High Definition Televisi... United States California \* City \* ZIP Code Irvine 92614 Example: 12345 Quantity Total Each **United States** California In Stock \* City \* ZIP Code 92614 Irvine Example: 12345 Each Quantity Total \$599.99 \$599.99 1 \* Phone Number 8562563668 Example: 9234567890 Shipping Method Ground (7-10 Business Days). \$45.00 ☐ This is a Gift Payment Next: Payment

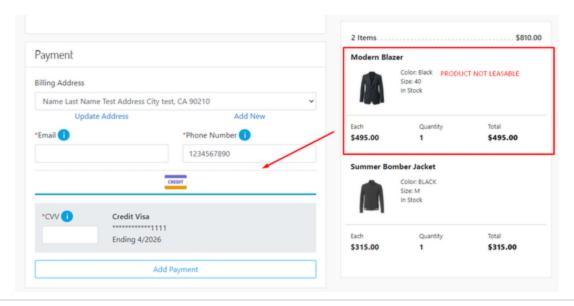
• Set the billing information, if is not the same of the Shipping, press **Update address** and fill the inputs



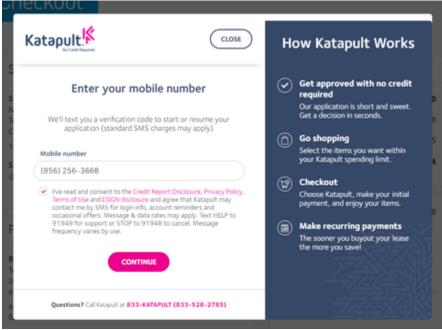
• Once is set the Payment information, select the tab for the Katapult payment method and press Next: Place Order button



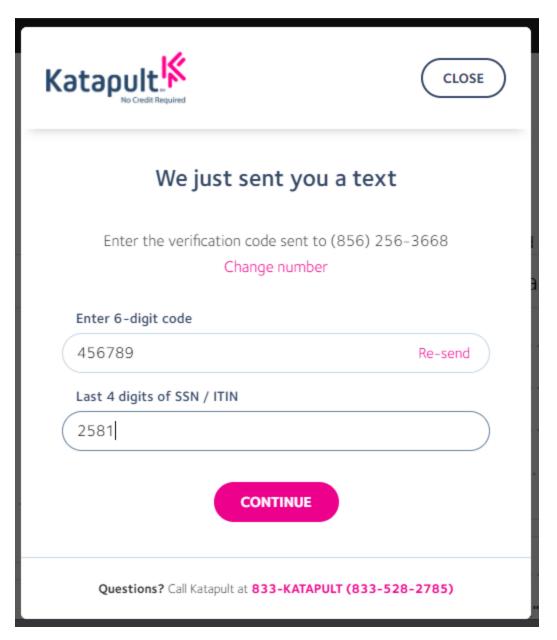
🛕 If all the products selected are not leasable the tab for the Katapult payment method will not be displayed



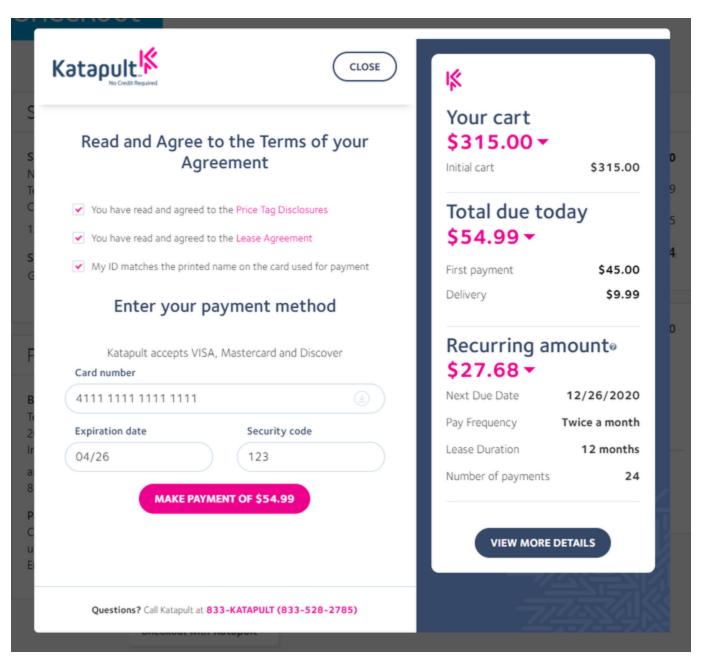
- On the next step a popup will appear to begin the checkout process with Katapult, proceed to add your mobile number to start a lease application for a new or existing Katapult lease
- Workflow for registered customers
  - Add the Mobile numbre 8562563668, review and agree the Katapult's Privacy Policy, Terms of Use, and Credit Report Disclosure



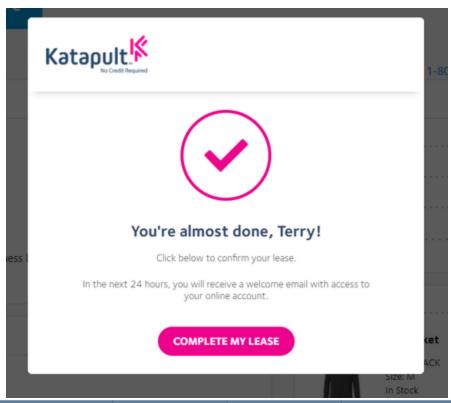
- · Add the code received on the text message and the last 4 digits of the SSN / ITIN added on the registration flow
- Introduce 456789 for the code and 2581 for SSN/ITIN



- · 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 da	ate	Order Number	First Name	Last Name	Sales Rep	Status
12-21-2	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:**

## **Billing Address:**

Terry Carr 2030 Main ST Irvine, CA 92614

tcarr2@mailtest.com 8562563668

## Payment:

# Vizio VO32LF 32" LCD High Definition Television



Quantity

Total

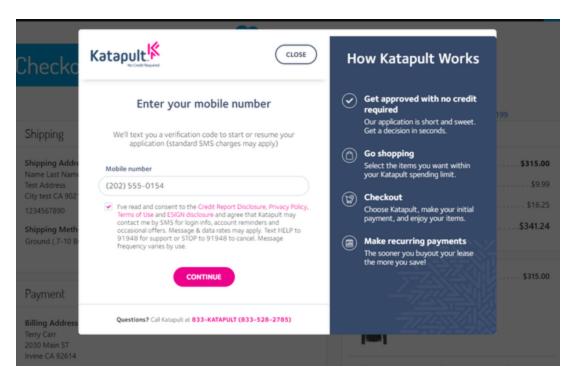
1

\$599.99

Total ......\$703.49

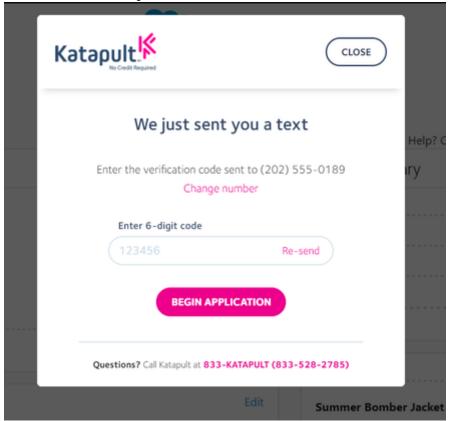
Workflow for new customers

• Insert your phone number

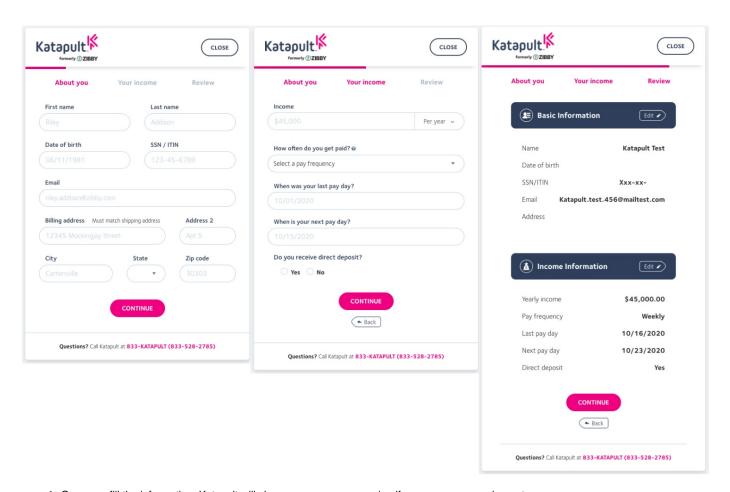


When a customer starts their application, they will receive a text message, which includes a link to katapult.com/legal to ensure they are
reviewing and accepting the terms. The text will also include their 6-digit verification code.

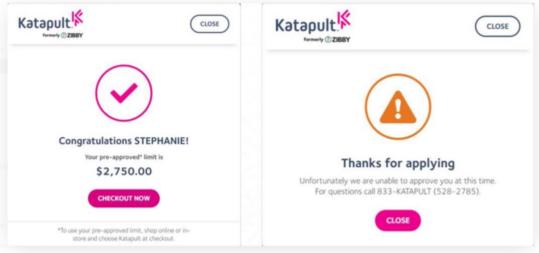
• Introduce the code received in the text message



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



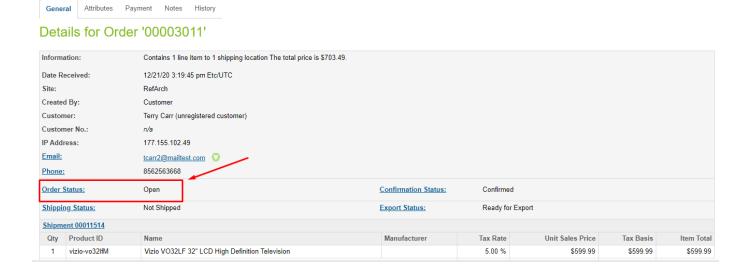
 Once you finish the registration process click on the Checkout with Katapult button to open again the popup and start the checkout process with Katapult

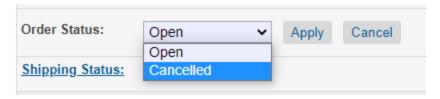
Ground . (7-10 Business Days ). . \$9.99 Payment Edit Billing Address: Terry Carr 2030 Main ST Irvine CA 92614 amejia@unitedvirtuaities.com 8562563668 Payment: Credit undefined undefined Ending undefined/undefined Checkout with Katapult

## Cancel an Order

Merchant Tools > Ordering > Orders > Order: 00003011(RefArch)

- 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.



1 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:

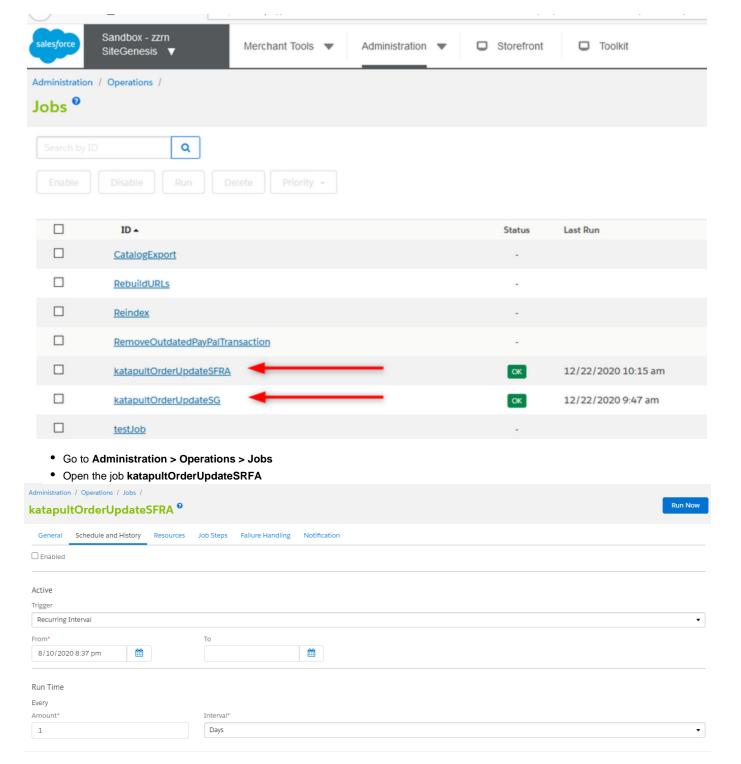
```
<external-line-item-status>canceled</external-line-item-status>
<custom-attributes>
   <custom-attribute attribute-id="KAT_cancelItem">true</custom-attribute>
```

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

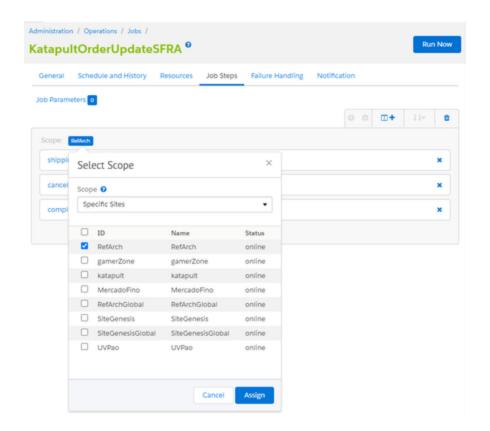
https://www.yoursite.com/Cancelltem-cancelltem?oid=00001203&oli=sony-ps3-console

```
Cancelltem-cancelltem?oid=00001203&oli=sony-ps3-console
```

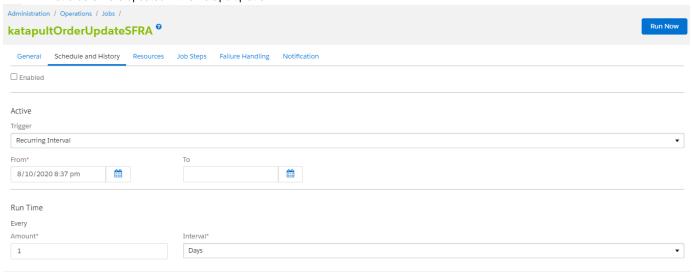
To avoid change Scope everytime, was created one JOB to SFRA and another to SiteGenesis:

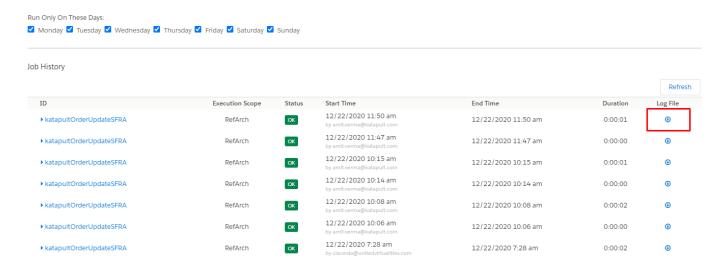


- Verify that the **steps** has selected the **Scope** option for your SFRA site, go to tab **Job Steps**
- Select your RefArch scope and press Assign



- 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

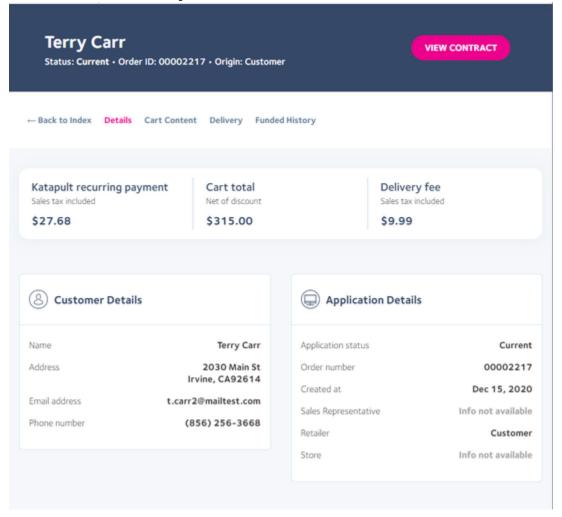




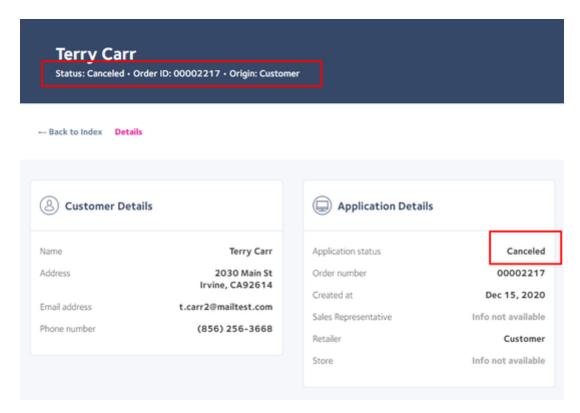
This is a row of the log from the order we canceled before in Salesforce, that includes information about the order number and the ID
from Katapult's platform

[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

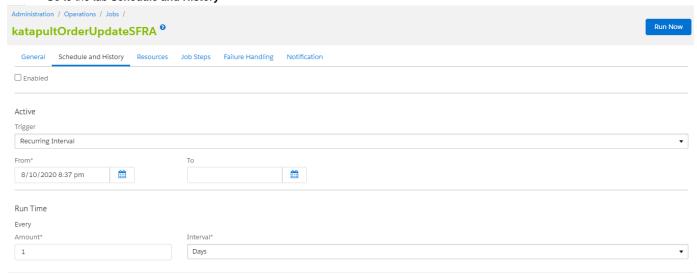


And this is the status of the order after running the Job

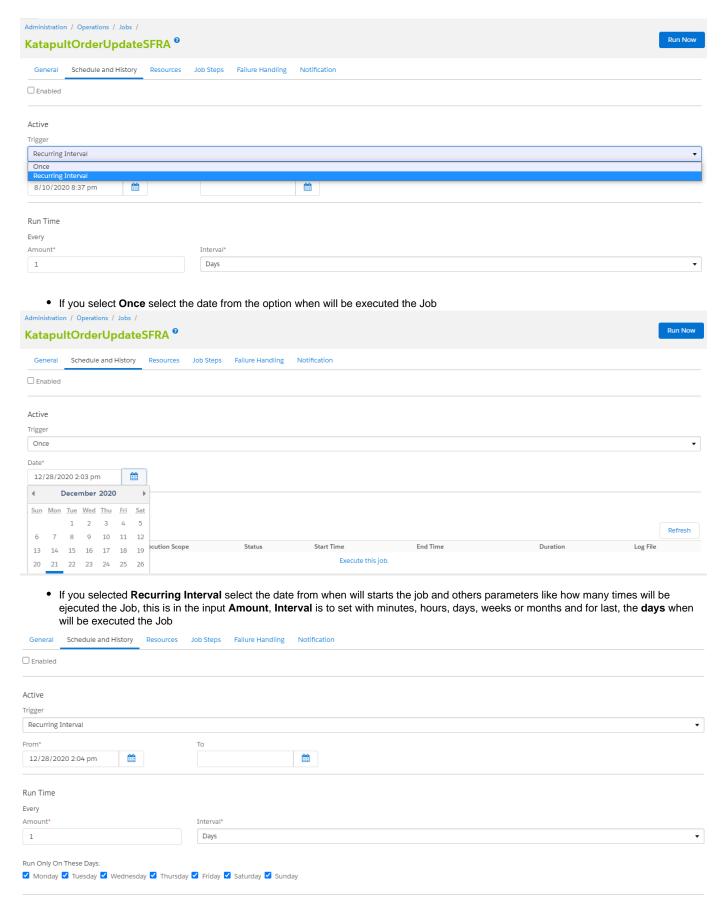


## **Configuring Job Schedules**

- 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



- 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

General	Schedule and History	Resources	Job Steps	Failure Handling	Notification	
Enabled						
	ents to Receive Notificatio Error DLong Runtime D					
From*			CC			
emal@e	email.com					
To*			BCC			
email@	email.com					
Long Runti	me Detection					

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

Exit Status: OK

☐ Enabled

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

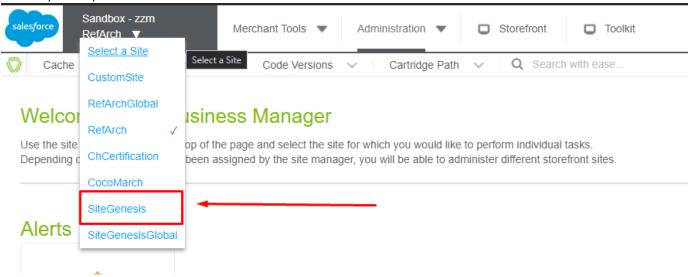
Step: complete

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

Administration > Site Development > Code Deployment

# Manage Code Versions

A code version is a folder containing custom cartridges. The currently active code version is used by the instance. Custom cartridges need to be assigned to sites in the module "Manage Sites". Additional code versions can be uploaded to the server via WebDAV or UX Studio. These may be new code versions that will be activated later, or old ones to allow for code rollbacks. You can delete inactive code versions. It's also possible to create a new empty version using the Add button on this page.

If multiple code versions are listed, you can activate an existing version from the list by selecting the Activate link next to it. Selecting Roll Back will automatically activate the previous version, if this code version is still installed.

A compatibility mode can be assigned to each code version and this compatibility mode is activated when the code version is activated. Code versions that haven't been explicitly assigned to a compatibility mode are marked with an asterisk (\*), and assume the current active compatibility mode. At any time the compatibility modes selectable are those newer than the active mode in addition to the previously active compatibility mode. It's not possible to select a compatibility mode older than the previously active one.

Select All	Active	Code Version	Compatibility Mode	Modification Time	Activation Time	Actions
		CH_v1	<u>19.10</u> *	6/18/20 4:15:38 pm	6/17/20 8:58:58 pm	Rename_Activate
		coco_m_v1	<u>19.10</u> *	12/10/20 12:14:58 pm	12/11/20 1:07:42 pm	Rename_Activate
	<b>✓</b>	katapult sfra	19.10 *	12/15/20 12:24:05 pm	12/17/20 10:33:37 am	
		katapult_sg	<u>19.10</u> *	12/11/20 2:02:33 pm	12/16/20 1:09:03 pm	Rename Activate
		stra_eric_test	<u>19.10</u> *	5/28/20 12:22:39 pm	6/17/20 8:58:44 pm	Rename Activa Act
		uo_v1_s1	19.10 *	10/19/20 2:55:33 pm	6/19/20 12:07:51 pm	Rename Activate
		version1	<u>19.10</u> *	5/11/20 4:56:24 am		Rename Activate
Refresh Delete Add						

• The code version will be marked

Select All	Active	Code Version	Compatibility Mode	<b>Modification Time</b>	Activation Time	Actions
		CH_v1	<u>19.10</u> *	6/18/20 4:15:38 pm	6/17/20 8:58:58 pm	Rename Activate
		coco_m_v1	<u>19.10</u> *	12/10/20 12:14:58 pm	12/11/20 1:07:42 pm	Rename_Activate
		katapult_efra	19 10 *	12/15/20 12:24:05 pm	12/17/20 10:33:37 am	Rename Activate
	<b>✓</b>	katapult_sg	<u>19.10</u> *	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
		<u>uo_v1_s1</u>	<u>19.10</u> *	10/19/20 2:55:33 pm	6/19/20 12:07:51 pm	Rename Activate
		version1	<u>19.10</u> *	5/11/20 4:56:24 am		Rename Activate
Refresh Delete Add						

• And now you will see SiteGenesis activated FREE 2-Day SHIPPING FOR ORDERS OVER \$300 commerce cloud | Get Pre-Approved with Katapult Q Enter Keyword or Item No. NEW ARRIVALS WOMENS MENS ELECTRONICS TOP SELLERS mens SHOPNOW SHOP SHOES THIS WEEKS DEALS SHOES: HEELS | FLATS | OPEN TOE GROUND SHIPPING ON ORDERS OF \$150 OR MORE salesforce Striped Silk Tie <del>\$29.99</del> **\$23.99** FOLLOW US ACCOUNT CUSTOMER SERVICE ABOUT