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

• Verify that the product selected is leasable, go to Business Manager and Merchant Tools > Products and Catalogs > Products

Merchant Tools > Products and Catalogs > Products

# SiteGenesis - Products

Select Simple to search for products by ID or name, Advanced to specify more search fields and sorting criteria, or By ID to display a list of product IDs.

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\*")

See Product Preferences to add columns to this page and all other product lists.

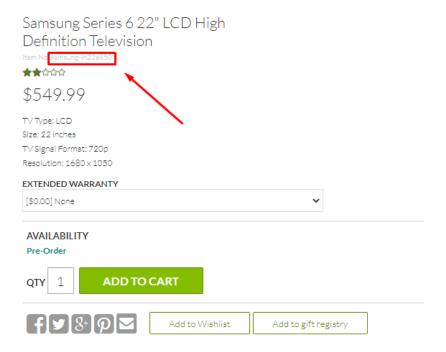


• On the input field search for the ID of the product selected in the Storefront



Electronics / Televisions / Flat Screen / Samsung Series 6 22" LCD High Definition Television

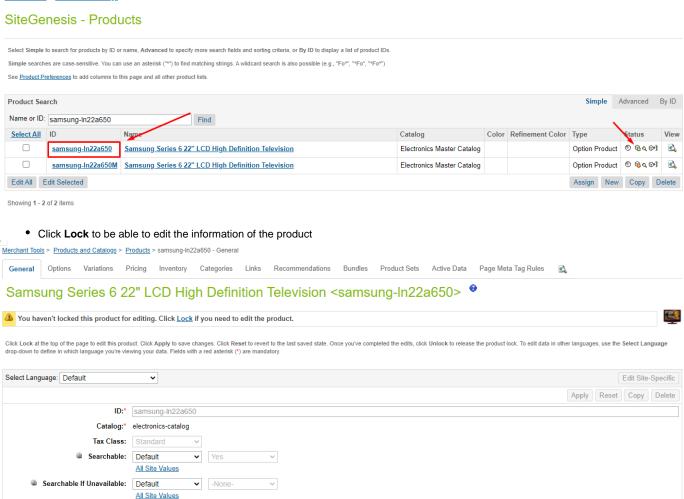




#### \*\*\*Merely illustrative product

· Click on the ID

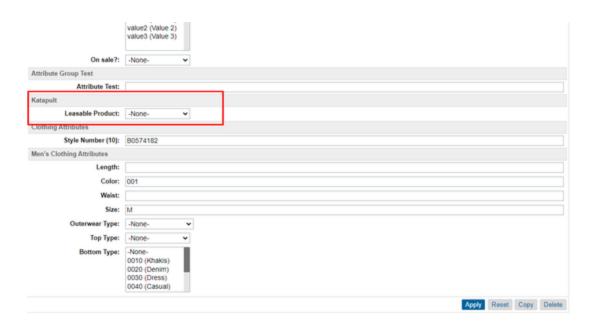
Merchant Tools > Products and Catalogs > Products



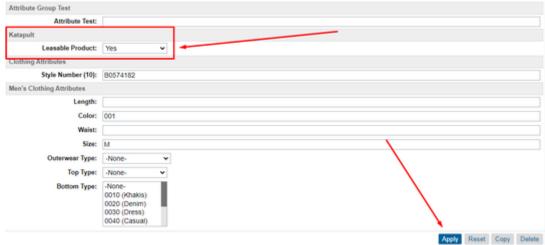
\*\*\*Merely illustrative product

Name: Samsung Series 6 22" LCD High Definition Television

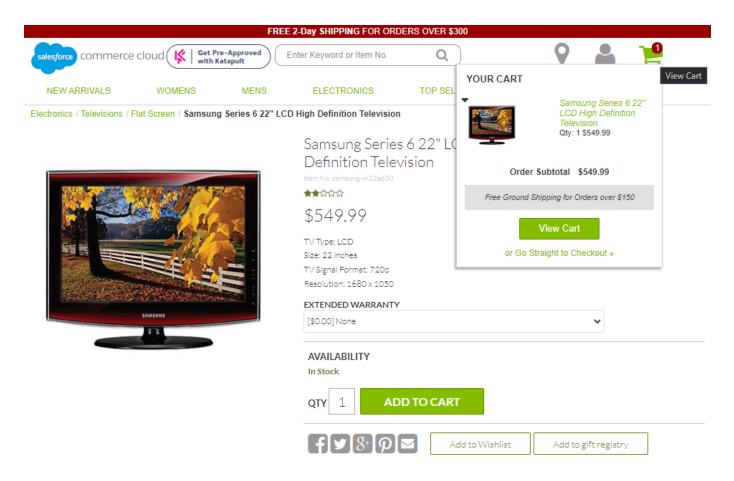
Scroll down to see all the attributes from the product and you will see the Katapult property, for default is NONE, the product is NOT LEASABLE



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

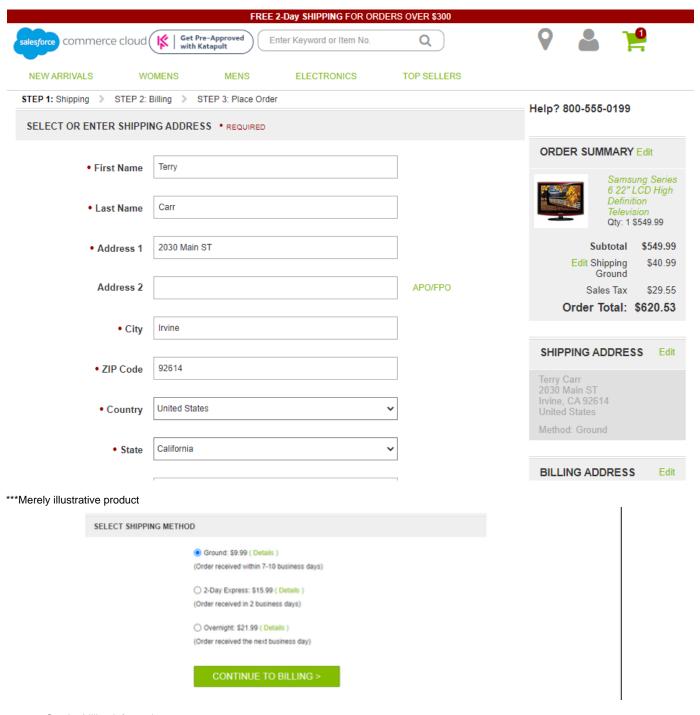


• Once the product selected is set as **Leasable** product, proceed to add it to Cart

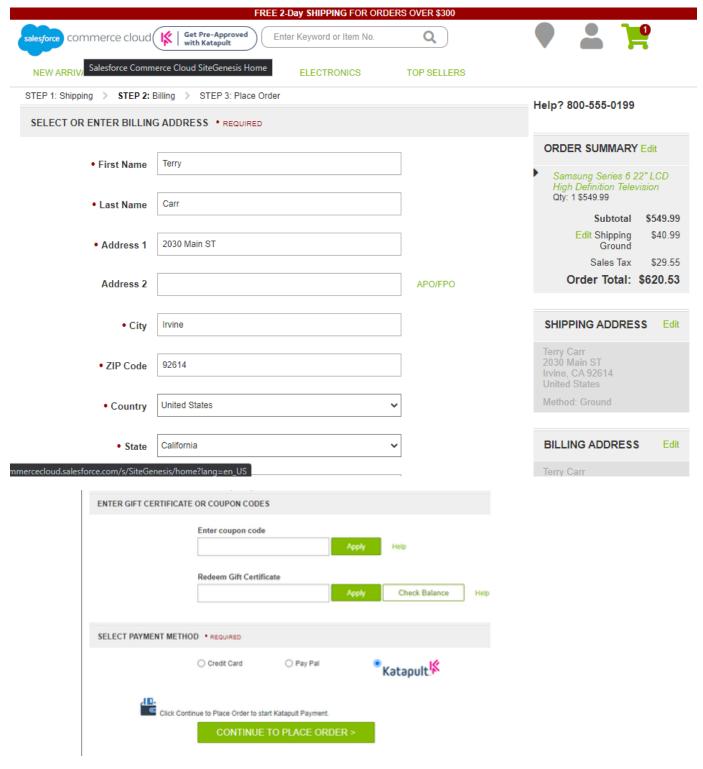


#### \*\*\*Merely illustrative product

• Go to the checkout proccess, fill the Shipping information and press Continue to Billing button



- Set the billing information
- Once is set the Payment information, select the option for the Katapult Payment Method and press Continue to Place Order button



 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 Number 8562563668, review and agree the Katapult's Privacy Policy, Terms of Use, and Credit Report Disclosure





## Enter your mobile number

We'll text you a verification code to start or resume your application (standard SMS charges may apply)

#### Mobile number

(856) 256-3668

I've read and consent to the Credit Report Disclosure, Privacy Policy, Terms of Use and ESIGN disclosure and agree that Katapult may contact me by SMS for login info, account reminders and occasional offers. Message & data rates may apply. Text HELP to 91948 for support or STOP to 91948 to cancel. Message frequency varies by use.

CONTINUE

Questions? Call Katapult at 833-KATAPULT (833-528-2785)

# **How Katapult Works**

Get approved with no credit required

Our application is short and sweet. Get a decision in seconds.

(f) Go shopping

Select the items you want within your Katapult spending limit.

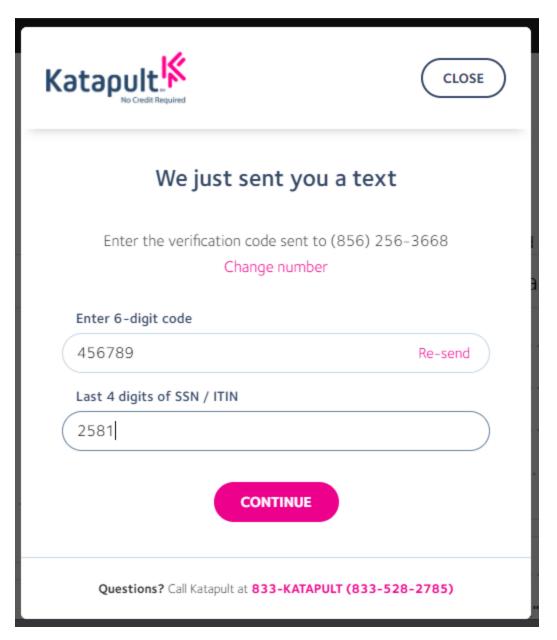
(p) Checkout

Choose Katapult, make your initial payment, and enjoy your items.

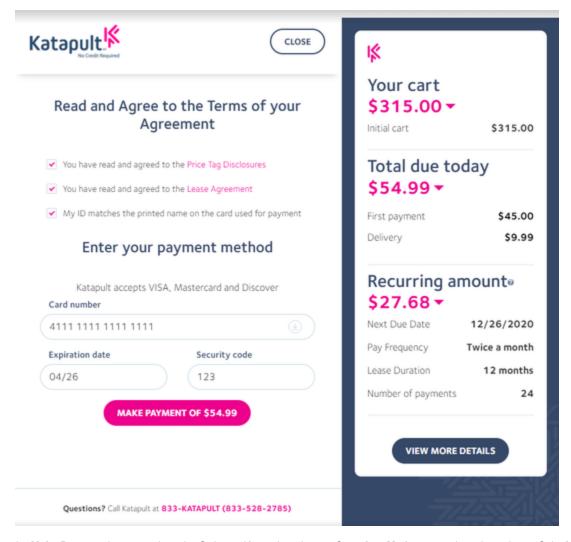
Make recurring payments
The sooner you buyout your lease

the more you save!

- · 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





# You're almost done, Terry!

Click below to confirm your lease.

In the next 24 hours, you will receive a welcome email with access to your online account.

COMPLETE MY LEASE

## Thank you for your order.

If you have questions about your order, we're happy to take your call (800-555-0199) Monday - Friday, 8AM - 8PM

# Order Number: **00003010**

Order Placed: Dec 21, 2020

PAYMENT METHOD Katapult Transaction Amount: \$620.53 BILLING ADDRESS

Terry Carr 2030 Main ST Irvine, CA 92614 Phone: 8562563668 PAYMENT TOTAL

Subtotal \$549.99 \$40.99 Shipping Ground \$29.55 Sales Tax Order Total: \$620.53

#### SHIPMENT NO. 1

SHIPPING STATUS: Not Shipped METHOD:

Ground

ITEM

Samsung Series 6 22" LCD High Definition Television

Shipping surcharge ITEM NO.: samsung-ln22a650 Extended Warranty: None

SHIPPING TO Terry Carr 2030 Main ST Irvine, CA 92614 United States 8562563668

PRICE

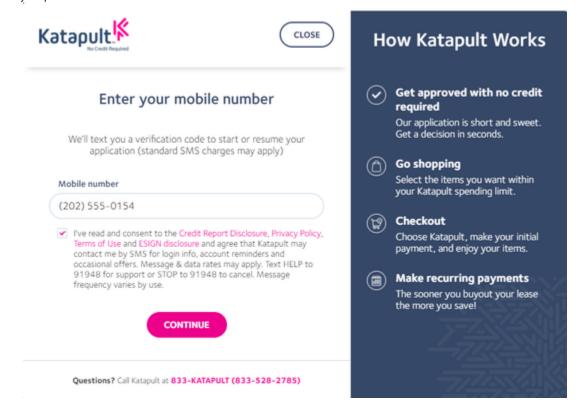
QTY \$549.99 + \$0.00

Order date	Order Number	First Name	Last Name	Sales Rep	Status
12-21-2020	00003010	Terry	Carr		Current

<sup>\*\*\*</sup>Merely illustrative product

#### Workflow for new customers

Insert your phone number



- When a customer starts their application, they will receive a text, 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

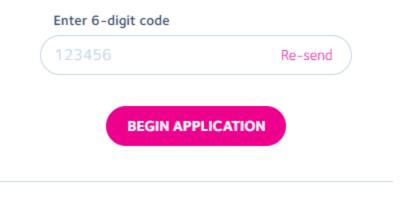




# We just sent you a text

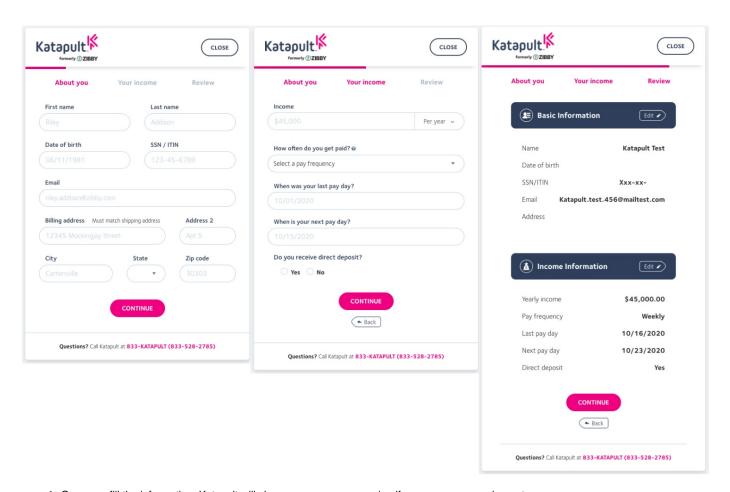
Enter the verification code sent to (202) 555-0189

Change number

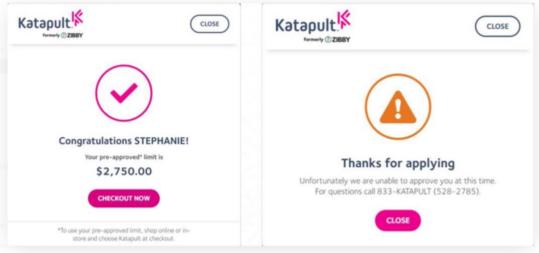


Questions? Call Katapult at 833-KATAPULT (833-528-2785)

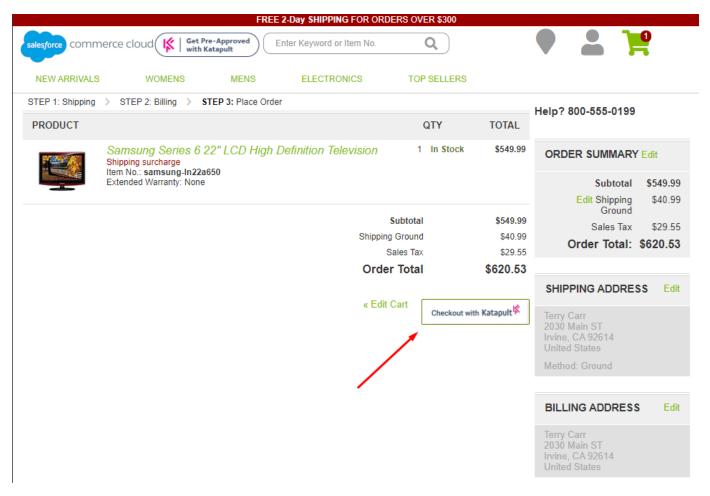
• Katapult's quick application is broken down into 3 simple steps: Basic info, Income, Review.



• 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

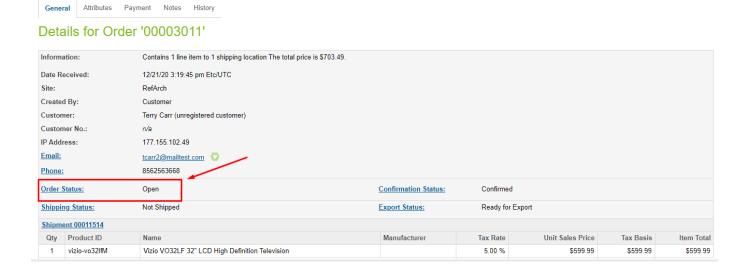


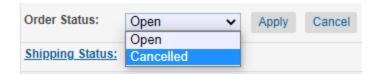
<sup>\*\*\*</sup>Merely illustrative product

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

### 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





<sup>\*\*\*</sup>Merely illustrative product

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:

XML

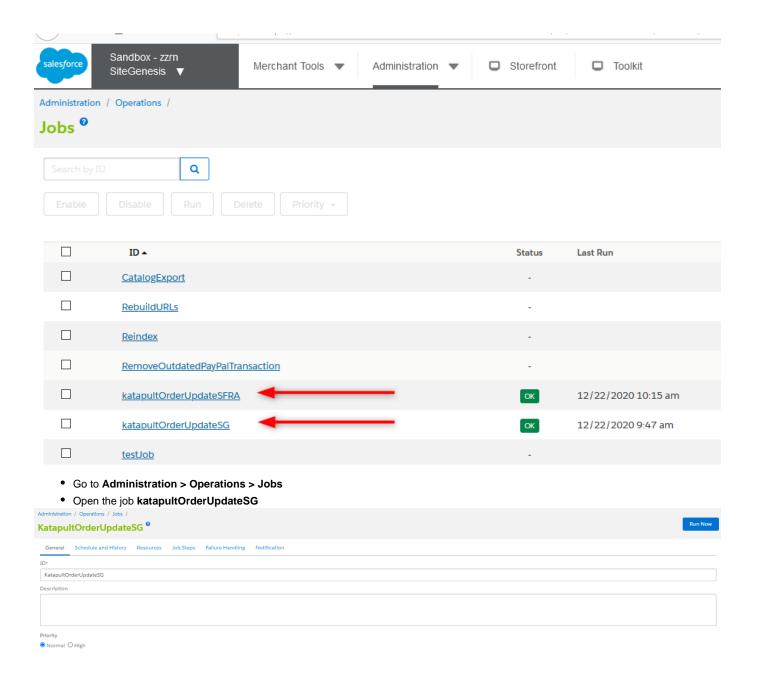
• The xml file must have a content like below:

1 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:

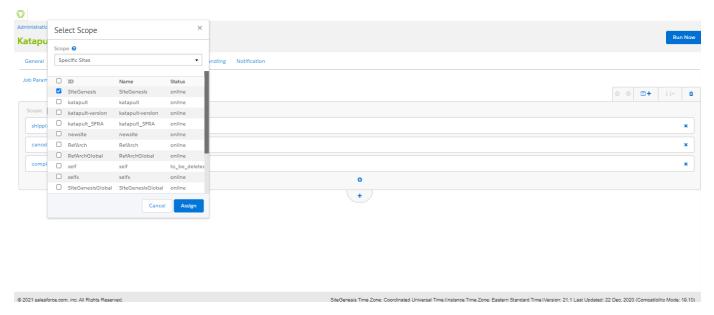
https://www.yoursite.com/Cancelltem-cancelltem?oid=00001203&oli=sony-ps3-console

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

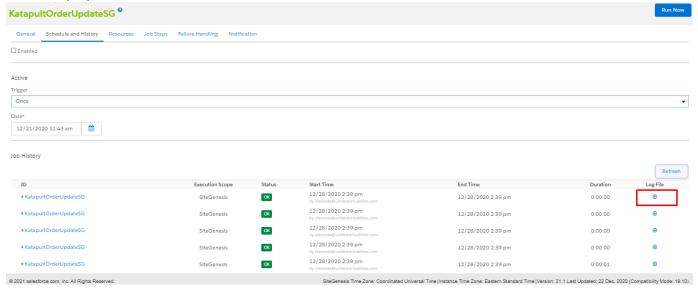
To avoid change Scope every time, was created one JOB to SFRA and another to SG:



- Verify that the steps has selected the Scope option for current site that you are working, go to tab Job Steps
- Select your SiteGenesis scope and press Assign



- Press the button Run Now to execute it, this job will update in Katapult's plataform 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, as well as the log file that includes what orders were updated in the Katapult plataform



 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

[2020-12-18 01:43:51.447 GMT] INFO CustomJobThread | 798179623 | katapultOrderUpdate | ordersFunctions-cancel --> Canceled order 00002405 -- kat\_uid -->2b287ca0a3ad4a879069a63138c313c2

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

# **Terry Carr**

Status: Current • Order ID: 00002217 • Origin: Customer

VIEW CONTRACT

← Back to Index Details Cart Content Delivery Funded History

Katapult recurring payment

Sales tax included

\$27.68

Cart total

Net of discount

\$315.00

Delivery fee

Sales tax included

\$9.99

Name Terry Carr

Address 2030 Main St

Irvine, CA92614

Email address t.carr2@mailtest.com

Phone number (856) 256-3668

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## Application Details

Application status Current

Order number 00002217

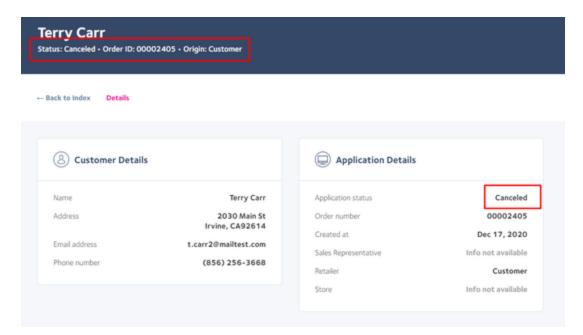
Created at Dec 15, 2020

Sales Representative Info not available

Retailer Customer

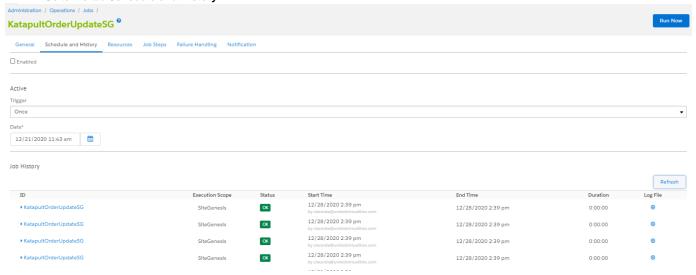
Store Info not available

• This is the status of the order after running the Job

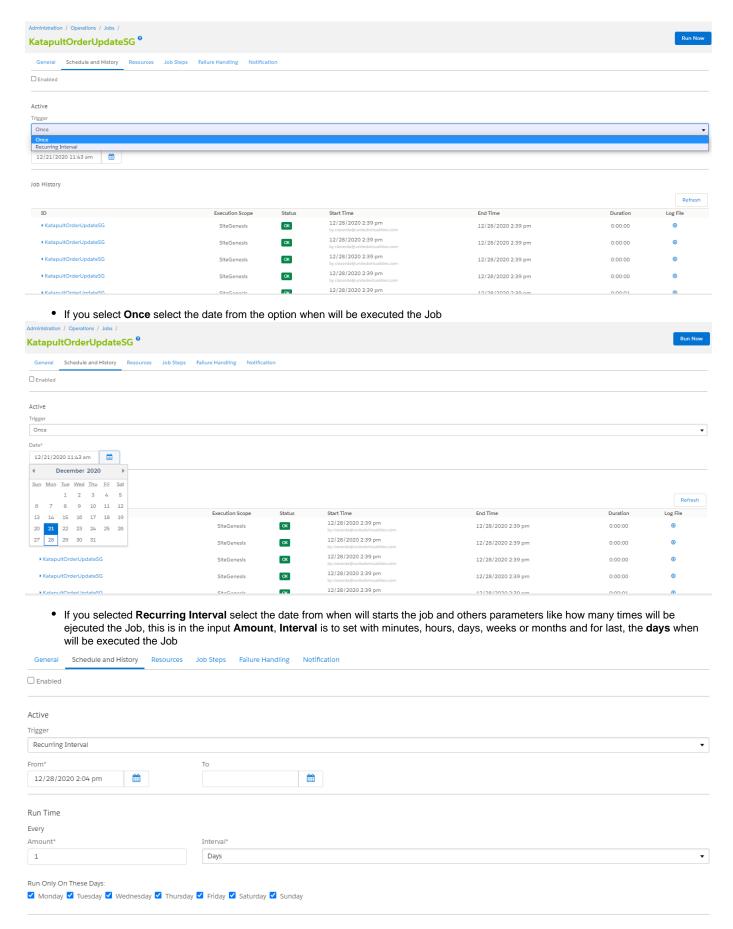


#### **Configuring Job Schedules**

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

Schedule and History Job Steps Failure Handling Notification Resources Enabled Select Events to Receive Notifications About: ✓ Ok ✓ Error ☐ Long Runtime ☐ Retry From\* CC emal@email.com To\* BCC email@email.com Long Runtime Detection ☐ Enabled · 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

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

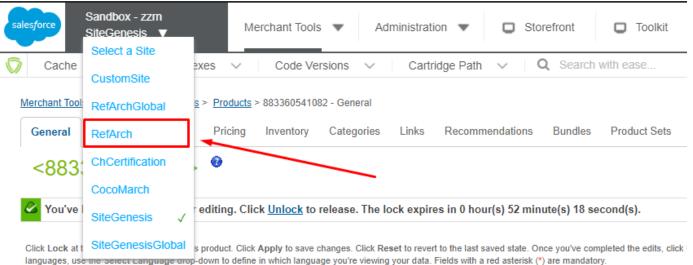
Execution Scope: RefArch

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 SFRA

· Open the options and select RefArch



Change the code version in Administration > Site Development > Code Deployment, locate the code version katapult\_sfra and
press 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	<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_sfra	<u>19.10</u> *	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	<u>19.10</u> *	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						

• The code version will be marked

Select All	Active	Code Version	Compatibility Mode	<b>Modification Time</b>	Activation Time	Actions
		<u>CH_v1</u>	<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	<u>19.10</u> *	12/15/20 12:24:05 pm	12/17/20 11:00:22 pm	
		<u>katapult_sg</u>	<u>19.10</u> *	12/11/20 2:02:33 pm	12/17/20 10:28:18 pm	Rename Activate
		sfra_eric_test	<u>19.10</u> *	5/28/20 12:22:39 pm	12/17/20 10:28:10 pm	Rename_Activate
		uo_v1_s1	<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 SFRA activated

